

# Effort User Manual

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## Dashboard

Dashboard helps user to monitor overall activities done by and yet to be performed by employees. Any lags in activities can be easily identified and can be addressed.

Links to various modules are available in menu bar, menu bar gives quick access to jobs, works, routes, forms, locate, dispatch, customers, employees, reports, admin and overflow menu. Notification count is displayed on notification icon.

### Unassigned jobs

- Delayed – Unassigned delayed jobs count is displayed, click on count to view list of delayed jobs.
- Rejected – Unassigned rejected jobs count is displayed, click on count to view list of Rejected jobs.

### Assigned jobs

- Delayed – Delayed jobs count is displayed, click on count to view list of delayed jobs.
- In Progress – In progress jobs count is displayed, click on count to view list of in progress job.

**To start:** Displays the count of jobs that are about to start, when clicked on count displays list of jobs that are about to start.

**Completed Today:** Displays the count of completed jobs, when clicked on count displays list of completed jobs for today.

**Completed Yesterday:** Displays the count of completed jobs, when clicked on count displays list of completed jobs for yesterday.

**All Scheduled:** Displays the count of all schedule jobs, when clicked on count displays list of all schedule jobs.

### Unassigned works

- Delayed – Delayed works count is displayed, click on count to view list of delayed works.
- Rejected – Unassigned rejected works count is displayed, click on count to view list of Rejected works.

### Assigned works

- Delayed – Delayed works count is displayed, click on count to view list of delayed works.
- In Progress – In progress works count is displayed, click on count to view list of in progress works.
- **To start:** Displays the count of works that are about to start, when clicked on count displays list of works that are about to start.

- **Completed Today:** Displays the count of completed works, when clicked on count displays list of completed works for today.
- **Completed Yesterday:** Displays the count of completed works for yesterday, when clicked on count displays list of completed works for yesterday.
- **All Scheduled:** Displays the count of all schedule works, when clicked on count displays list of all schedule works.

#### Customer check-ins

- **Today:** Displays the count of number of check-ins done for customers by employees for today.
- **Yesterday:** Displays the number of check-ins done for customers by employees for yesterday.

#### Pending Approvals

- **Forms:** Displays the count for number of forms waiting for action, when clicked on count displays list of pending forms.
- **Leaves:** Displays the count for number of leaves waiting for action, when clicked on count view list of pending leaves.

#### Form activities

- **Today:** Displays the count for number of forms filled for today, when clicked on count view list of forms.
- **Yesterday:** Displays the count for number of forms filled for Yesterday, when clicked on count displays list of forms.

#### Employees

- **On Field:** Displays the count for number of employees on field, click on count to view list of employees on field.
- **Not Synced:** Displays the count for number of employees not synced, click on count to view list of employees not synced.
- **Activation pending:** Displays the count for pendings activation of employees, click on count to view list of activation pendings.

Field employees battery status and last known locations are displayed in bottom pane.

Feeds are displayed on left pane, feeds are nothing but recent activities done by employees.

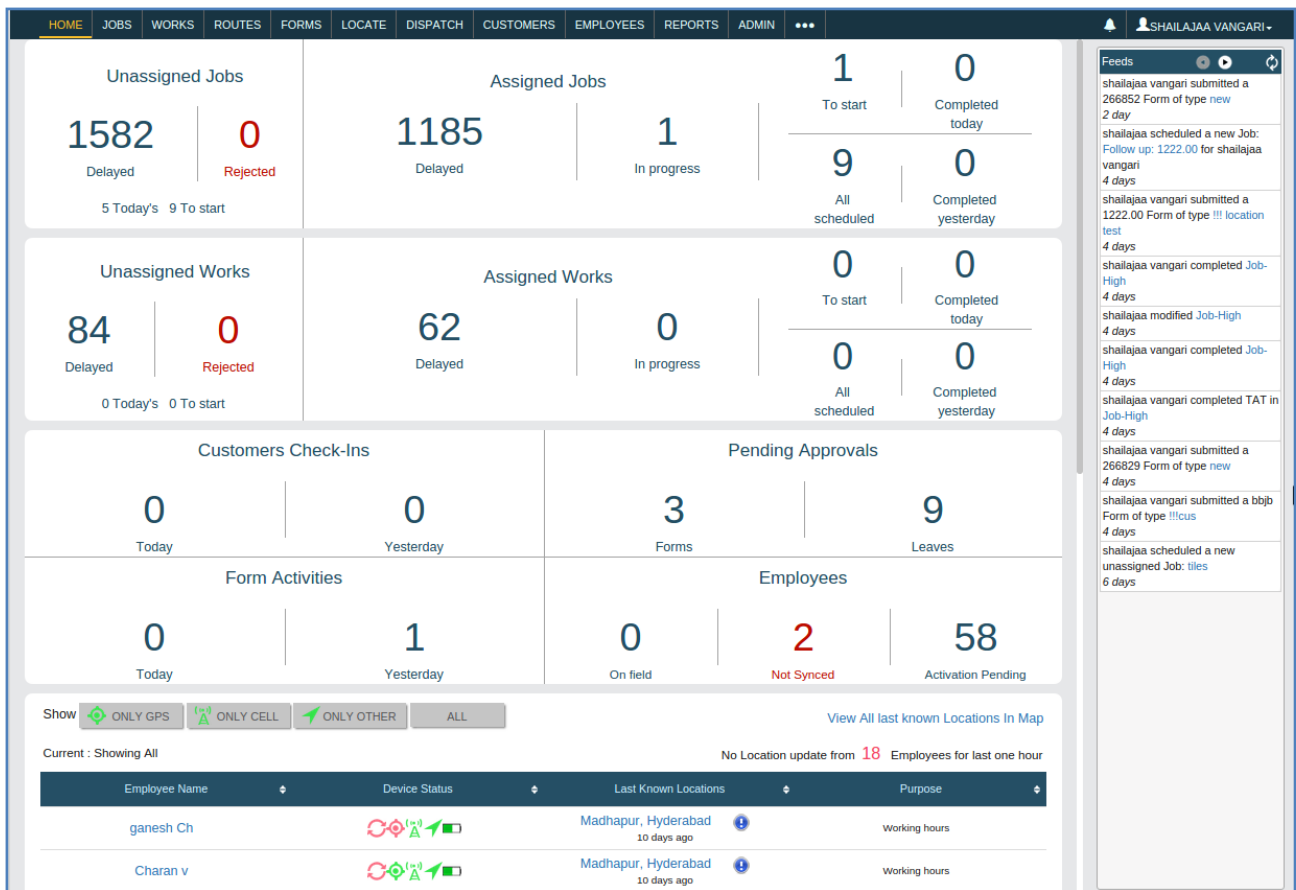


Figure 1: Dashboard

## Employee

User can create employees in this section and can configure settings for them.

**Navigation:** Menu-bar >>Employees

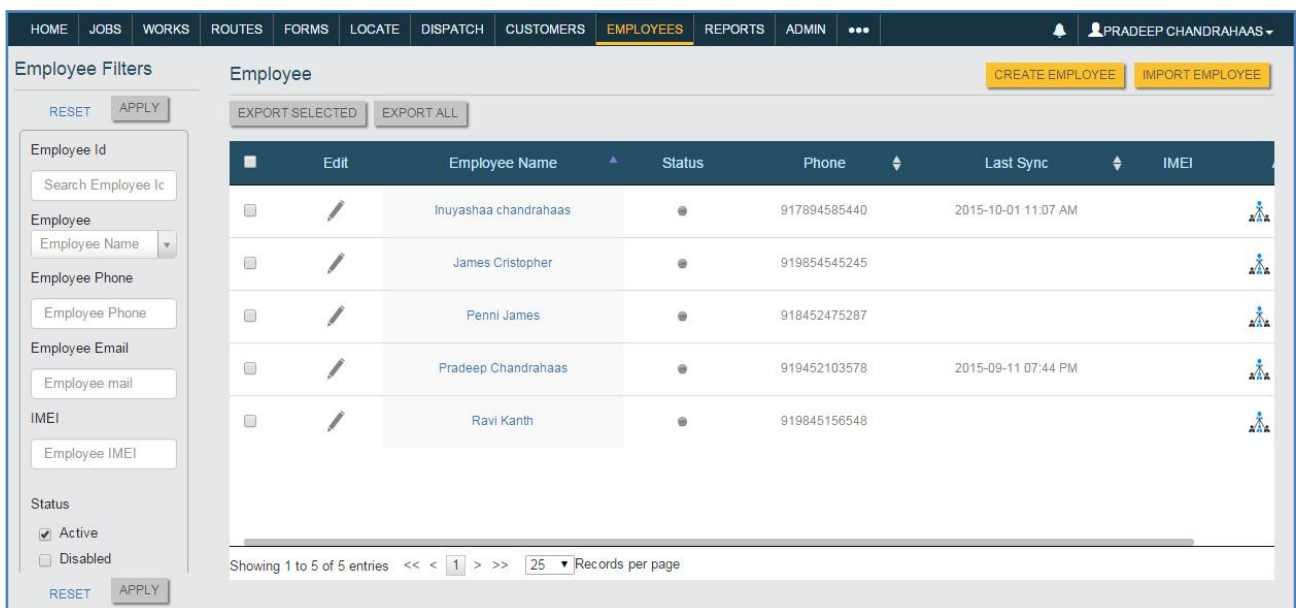


Figure 2: Employee List screen

This screen displays the list of employees. User can filter employees by applying filters from left pane. User can filter employees based on employee id, employee name, employee phone number, employee E-mail, IMEI number and employee status. Enter filter values and click on apply for applying filters, click on reset to clear all filters.

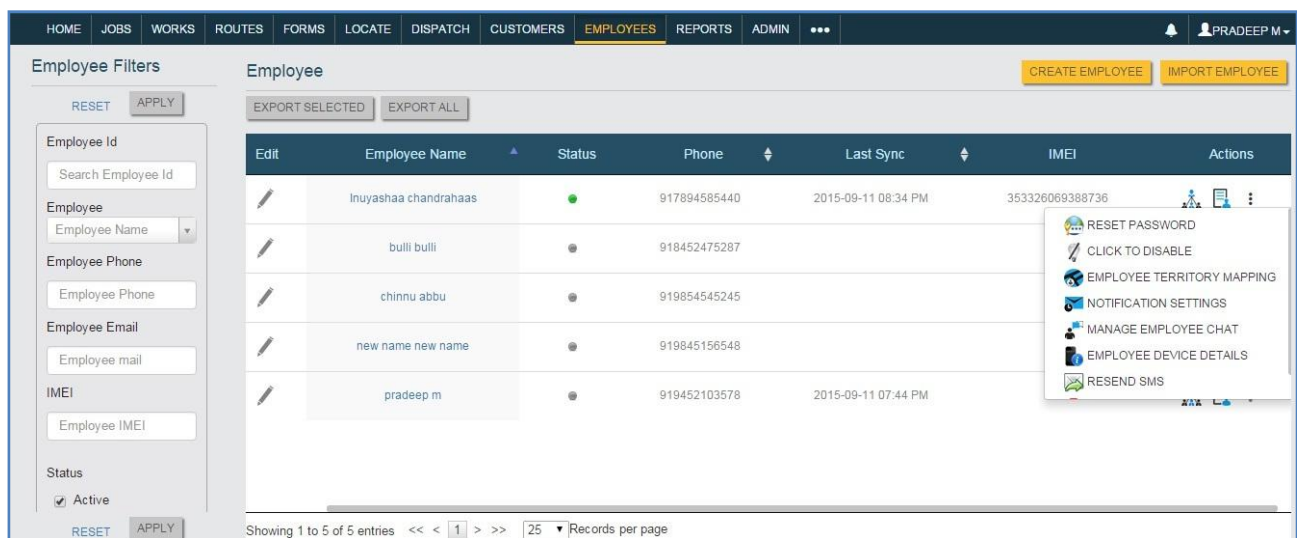
### Export selected

This will export only selected employees into Excel sheet.

### Export All

On click exports all employees into Excel sheet.

## Actions on Employees



*Figure 3: Actions on employees*

Below are the list of actions that can be performed on employees.

- 1) Edit
- 2) Employee customer mapping
- 3) Employee List mapping,
- 4) Reset password
- 5) Disable/ Enable employees
- 6) Employee Territory mapping
- 7) Notifications settings
- 8) Manage Employee Chat
- 9) Device Details
- 10) Resend SMS

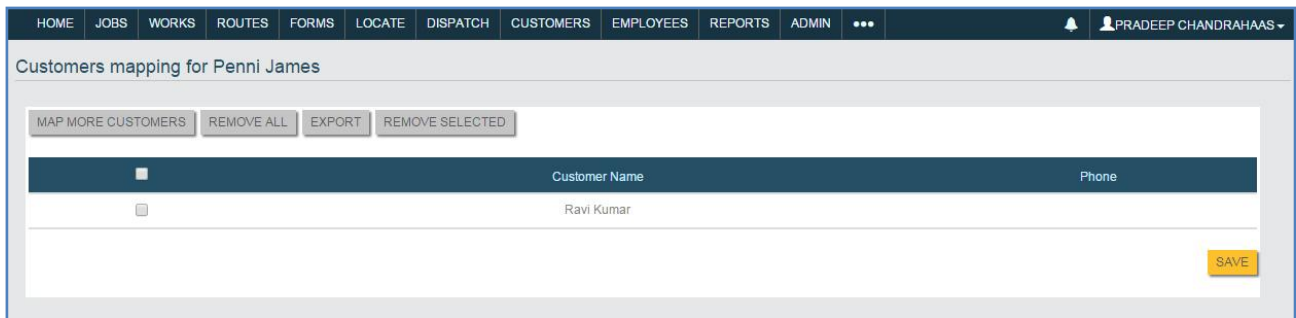
## 11) Delete Web-Panel account

### Edit

This is used to edit employee's details.

### Employee customer mapping

This is used to map Employees with customers.



*Figure 4: Employee Customer Mapping*

User can remove mapping by clicking on remove all, individual customers can be removed by selecting customer and click remove selected. User can also map more customers by clicking on map more customers. User can Export customers into Xls by clicking on Export. Click on save to save the mapping for customer.

### Employee List Mapping

Employees can be mapped with list so the mapped list values are assigned to employee.

### Reset Password

This is used to change/reset Password.

### Disable/Enable Employees

This is used to Enable or Disable employees.

### Employee Territory mapping

Employee territory mapping can be done here.

### Notifications Settings

Notification settings can be configured here.

### Manage Employee Chat

Chat settings can be configured here.

Manage Employee Chat

Select Employees with whom Penni James can chat with

☒ Select / Unselect All SAVE

Click to enable chat	
Inuyashaa chandrahaas	<input checked="" type="checkbox"/>
James Cristopher	<input checked="" type="checkbox"/>
Pradeep Chandrahaas	<input checked="" type="checkbox"/>

SAVE

*Figure 5: Manage Employee Chat*

**Step 1:** Select employees by selecting the check box against them.

**Step 2:** User can select/unselect all employees at once for chat by selecting select all/ unselect all.

**Step 3:** Click on save.

So now user can chat with the selected employees and selected employees can chat with user.

### Device details

Employee device details can be checked here.

### Resend SMS

If the employee is not activated even after all settings click on resend to send activation message to employee's mobile app and if employee confirms activation message by sending sms, employee will become active.

### Delete web panel account

Click on delete to delete web panel account for employee.

## Create Employee

This will navigate user to create employee screen, where an employee can be created by giving all required details.

## Employee Details

The screenshot shows a web application interface for creating a new employee. The top navigation bar includes tabs for HOME, JOBS, WORKS, ROUTES, FORMS, LOCATE, DISPATCH, CUSTOMERS, EMPLOYEES (highlighted), REPORTS, and ADMIN. The user is logged in as PRADEEP SPOORS. The main section is titled 'Create Employee' and contains a form with the following fields:

- \*First Name: Pradeep
- \*Last Name: Kumar
- Employee ID: 12345
- Type: Field (dropdown menu)
- Reporting Manager: pradeep spoors (dropdown menu)
- Manager: ☒
- Email: Pradeep@gmail.com
- Create web panel account: ☒
- \*Mobile: 919008587492 (with a note: e.g. 919000464327)

Buttons for 'SAVE' and 'SAVE & NEW' are located at the top right of the form.

*Figure 6: Employee Details Section*

Employee First name, Last name, Mobile number, E-mail id are mandatory fields and rest are optional fields.

- User can select roles for Employees from the dropdown. In order to select roles first user has to create roles, refer Manage Roles section under “Workflows section” for creating Roles.
- User can select time zone for employee that is in which time zone employee has to work.
- Employee customer mapping can be done in “Auto Map Customer to Employee”. If mapping is set to “No” Customer is not visible to employee who created him/her, for “No Explicit mapping exists” select the option as required.
- User can select reporting manager for employee.
- User can create his own required calendar and these calendars will reflect in the calendar dropdown. For creating calendar refer Admin>>calendar section>>Create Calendar.
- Select the manager check box so that employee is being created will have access to web account.
- Select employee type. Employees are classified into 2 types Field employees and Back office employees.
- Field employee performs field works where as back office employee works from web panel i.e. managing field employees tasks such as assigning jobs, works, route plans etc to field employees as per permissions given to him on field employees.



## App Settings

HOME	JOBS	WORKS	ROUTES	FORMS	LOCATE	DISPATCH	CUSTOMERS	EMPLOYEES	REPORTS	ADMIN	...
------	------	-------	--------	-------	--------	----------	-----------	-----------	---------	-------	-----

Mobile PIN:

Ask PIN if app is in background :

When Device Exceeds Deviation Time:

Permissible deviation time:

Show internet connectivity errors beyond working hours: ☐ ?

Show start/stop work in mobile app: ☒

Capture Call logs: ☐ ?

Capture SMS logs: ☐ ?

Upload large files(>500 KB):

*Figure 7: App settings screen*

User can set lock for mobile app through Mobile pin, to access mobile app user has to enter pin.

- User can warn or block all activities of employee for altering mobile handset time this can be done by Setting “When device exceeds deviation time” field. User can set the permissible deviation time, if it exceeds user specified actions are imposed.
- Option to display start/ stop icon in mobile can be configured here by selecting “Show start /stop work” in mobile app.
- Users call logs and sms logs can be captured in Device Event Logs by clicking on corresponding check boxes.
- User can choose options Wi-Fi and Mobile data or only Mobile data to upload files which are larger than 500 kb.

**Note:** Mobile handset time should match with actual time zone, a difference of 15 Minutes is acceptable, if it exceeds user specified actions are imposed.

## Track and Sync settings

HOME	JOBS	WORKS	ROUTES	FORMS	LOCATE	DISPATCH	CUSTOMERS	EMPLOYEES	REPORTS	ADMIN	...
------	------	-------	--------	-------	--------	----------	-----------	-----------	---------	-------	-----

Track and Sync Settings

Track :

During Work Hours

Tracking frequency:

300

(In seconds)

Track via:

Data only

Track Upload Frequency:

Immediately

Sync frequency during work hours:

5 minutes

Sync frequency during non-work hours:

30 minutes

Location provider:

Unified

(Affects android only)

Figure 8: Track & Sync Settings

Select track timing when employee has to be tracked, select the things like track frequency and mode of tracking, sync frequency during working and non working hours and location provider from dropdown.

## Address Settings

HOME	JOBS	WORKS	ROUTES	FORMS	LOCATE	DISPATCH	CUSTOMERS	EMPLOYEES	REPORTS	ADMIN	...
------	------	-------	--------	-------	--------	----------	-----------	-----------	---------	-------	-----

Address Settings

Street:

bapu nagar

Area:

sr nagar

City:

Hyderabad

District:

Ranga reddy

Pin code:

500038

Landmark:

Statue

Country:


India

State:

Andhra Pradesh

Home Latitude:

20.262197124246534



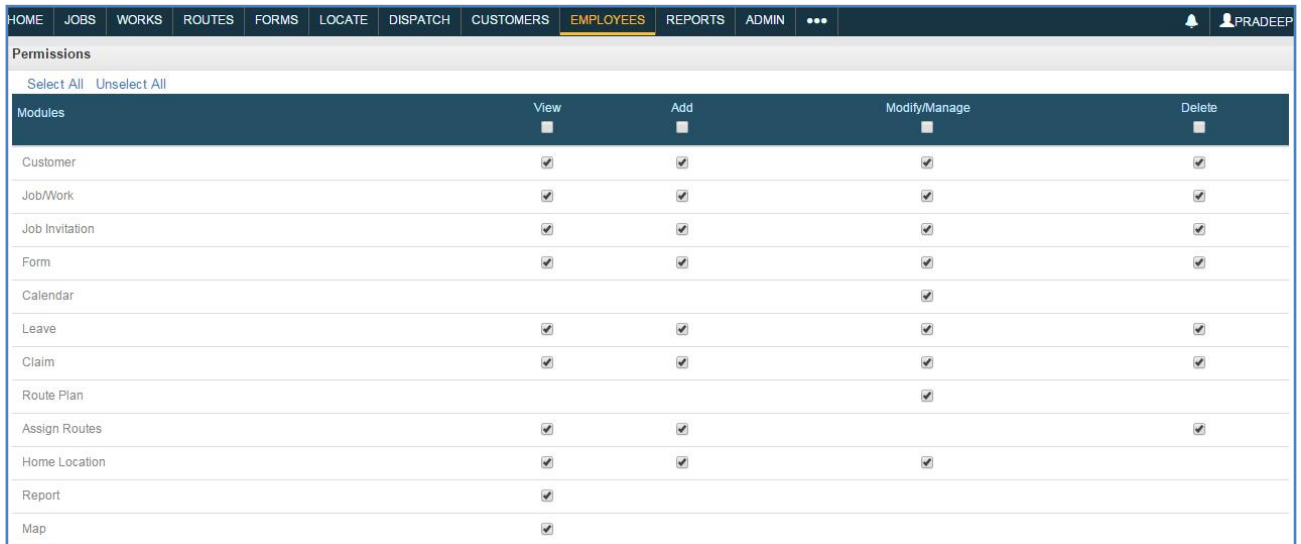
Home Longitude:

79.4970703125

Figure 9: Address settings

Enter the address and location details, this home location is displayed on map in locate screen.

## Permissions



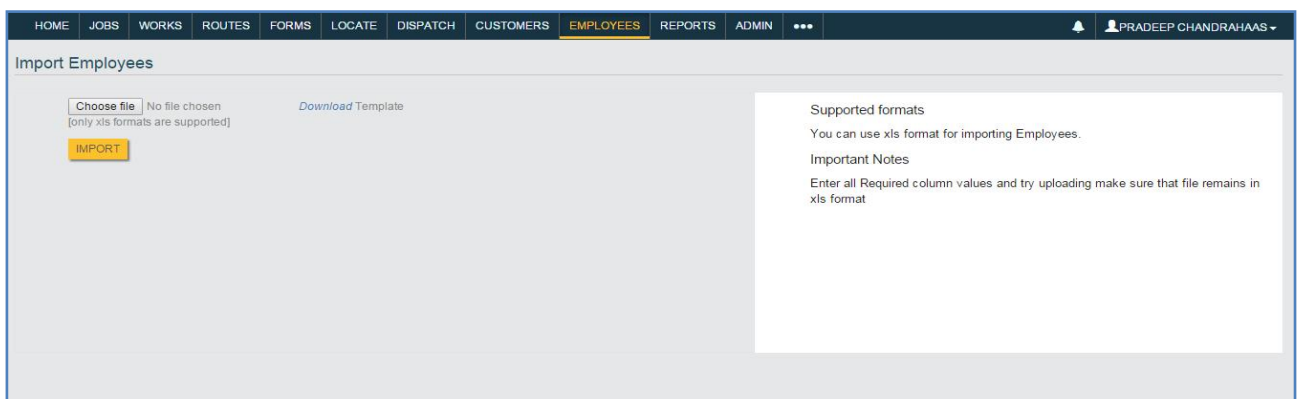
Permissions				
Select All Unselect All				
Modules	View	Add	Modify/Manage	Delete
Customer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Job/Work	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Job Invitation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Form	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Calendar			<input checked="" type="checkbox"/>	
Leave	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Claim	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Route Plan			<input checked="" type="checkbox"/>	
Assign Routes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Home Location	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Report	<input checked="" type="checkbox"/>			
Map	<input checked="" type="checkbox"/>			

*Figure 10: Permission settings*

Permissions are classified into 4 types view, add, modify/manage and delete. Permissions are independent to employees and can be given with permissions as per business requirement. Click on save to bring these permissions into affect. User can select view, add, modify/manage, delete permissions for all modules by selecting the check box corresponding to view, add, modify/manage, delete.

## Import employees

This will navigate user to Import employee screen where user can upload employees in bulk.



HOME

JOBS

WORKS

ROUTES

FORMS

LOCATE

DISPATCH

CUSTOMERS

EMPLOYEES

REPORTS

ADMIN

...

PRADEEP CHANDRAHAAS

Import Employees

Choose file

No file chosen  
(only xls formats are supported)

Download Template

IMPORT

Supported formats

You can use xls format for importing Employees.

Important Notes

Enter all Required column values and try uploading make sure that file remains in xls format

*Figure 11: Import Employees screen*

Step 1: Click on download Template

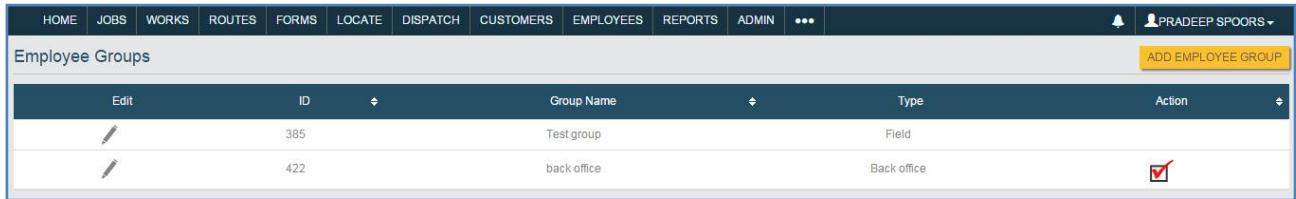
Step 2: Enter details in template and click on save.

Step 3: Click on choose file for selecting file and click on import.

## Employee Groups

**Navigation:** Admin>> Employees>>Employee Groups

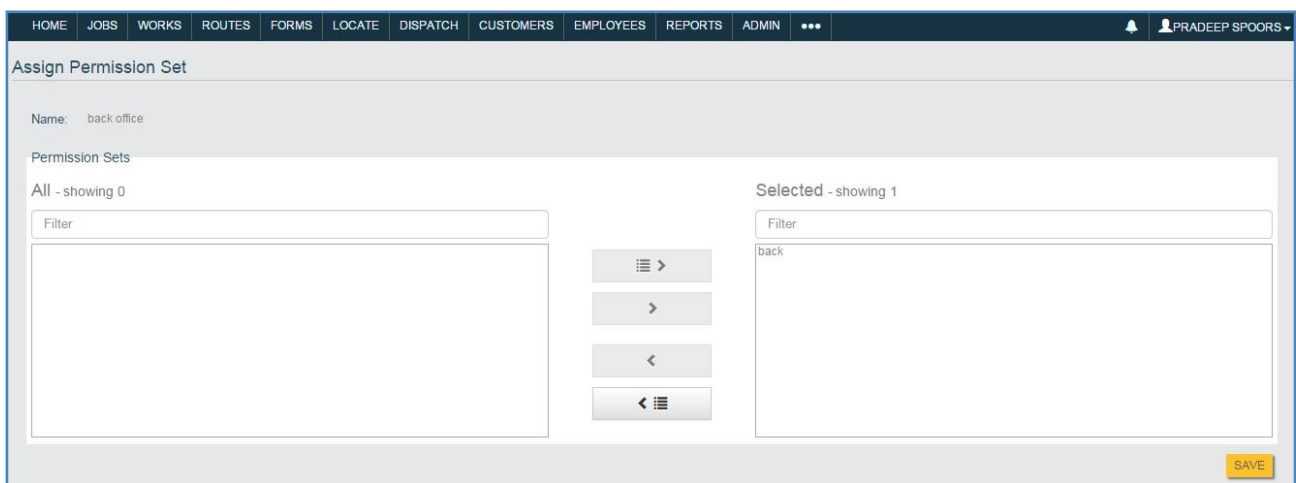
Employees can be grouped together to form a group, list of employee groups are displayed in this screen, user can create employee group clicking on add employee group. One of the purpose for creating employee group is to give permissions to back office employee on employee group.



Edit	ID	Group Name	Type	Action
	385	Test group	Field	
	422	back office	Back office	

*Figure 12: Employee Group list screen*

Click on red tick mark Checkbox



Name: back office

Permission Sets

All - showing 0

Filter

Selected - showing 1

Filter

back

SAVE

*Figure 13: Assign permission set screen*

Step 1: To select employee group click on employee group under all and click on right arrow button.

Step 2: To unselect employee group click on employee group under selected and click on left arrow button.

so back office employee will have selected permissions on the employee group

Click on **Add Employee group** to create an employee group

*Figure 14: Create Employee Group screen*

**Step 1:** Enter Group Name.

**Step 2:** Select type to field/back office as required.

**Step 3:** Select the Employee and click on Right Arrow button.

**Step 4:** To remove employee select the employee and click Left Arrow button.

**Step 5:** Click on save.

## Permission Set

**Navigation:** Admin>Employees>>Permission set

Permission set is usually imposed on an employee group. Permissions are given by selecting the checkbox against the action name. Generally permission set is assigned to back office employee so that back office employee will have permissions on the imposed employee group.

Edit	ID	Name
	65	new

*Figure 15: Permission set List screen*

Permissions are classified into 4 types view, add, modify and delete. Click on “Create New Permission set” to create new permission set.

**Create Permission Set**

Name: Dev

Permissions

Select All Unselect All

Modules	View	Add	Modify/Manage	Delete
Customer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Job/Work	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Job Invitation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Form	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Calendar	<input checked="" type="checkbox"/>		<input type="checkbox"/>	
Leave	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Claim	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Route Plan			<input type="checkbox"/>	
Assigned Routes	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Home Location	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Report	<input checked="" type="checkbox"/>			

Figure 16: Create Permission set

Step 1: Enter name.

Step 2: Edit permissions by selecting the checkbox.

**Employee Groups**

All - showing 0

Filter

Selected - showing 1

Filter

Dev Group

Note: The permissions above will be affected on the Employees under the groups on the right hand-side box.

Figure 17: Assign Permission set

Step 3: Select the Employee group by selecting group under all and click on right arrow button.

Step 4: Click on Save.

## Organizational Chart

Hierarchy of employee structure is displayed in this screen. Click on "Click here for organization chart" button to view the hierarchy of Employees. User can also search for employee by using search bar.

**Navigation:** Admin>>Employees>>Organizational Chart

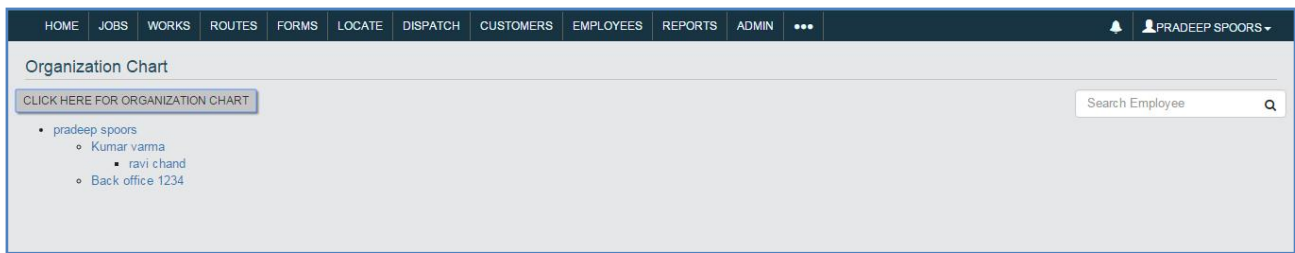


Figure 18: Organization Chart

## Device Event Logs

**Navigation:** Admin>>Employees>>Device Event Logs

This gives details about the mobile device such as number of calls made/received, messages sent/received, GPS status On/Off, Network status On/Off, mode of internet using etc. user can filters device events logs by applying filters from left pane, filters include event types, from and to date, Employee name. Enter filter values and click on apply for applying filters, click on reset to clear all filters.

S.No	Employee Name	Event Type	Details	Time
1	Inuyashaa chandrahaas	Network On	{"wifi":"off","mobileData":"on"}	2015-09-11 08:29 PM
2	Inuyashaa chandrahaas	Network Off	{"wifi":"off","mobileData":"off"}	2015-09-11 08:06 PM
3	Inuyashaa chandrahaas	Network On	{"wifi":"off","mobileData":"on"}	2015-09-11 08:05 PM
4	Inuyashaa chandrahaas	Network Off	{"wifi":"off","mobileData":"off"}	2015-09-11 08:02 PM
5	Inuyashaa chandrahaas	Network On	{"wifi":"on","mobileData":"off"}	2015-09-11 07:57 PM
6	Inuyashaa chandrahaas	Network Off	{"wifi":"off","mobileData":"off"}	2015-09-11 07:55 PM
7	Inuyashaa chandrahaas	App Installed	{"installedVersionCode":"201509091","installedVersionName":"4.0.0-ND-201509091"}	2015-09-11 07:44 PM
8	pradeep m	Network Off	{"wifi":"off","mobileData":"off"}	2015-09-11 07:42 PM
9	pradeep m	Network On	{"wifi":"on","mobileData":"off"}	2015-09-11 07:38 PM
10	pradeep m	Network Off	{"wifi":"off","mobileData":"off"}	2015-09-11 07:37 PM
11	pradeep m	Network On	{"wifi":"on","mobileData":"off"}	2015-09-11 07:36 PM
12	pradeep m	Network Off	{"wifi":"off","mobileData":"off"}	2015-09-11 07:36 PM

Figure 19: Device event logs

**Step 1:** Select event types

**Step 2:** Select Date Range

**Step 3:** Select Employees

**Step 4:** Click on Apply, click on reset to clear filters.

## Import Employee Status

Employee Bulk Upload status is displayed in this screen.

**Navigation:** Admin>>Employees>>Import Employee Status

## Import Customer Mapping

**Navigation:** Admin>>Employees>>Import Customer Mapping

Bulk Employee customer mapping can be uploaded in a single go.

Download template fill details and upload the Document.

## Import List Mapping

Bulk List mapping can be uploaded in a single go.

Download template fill details and upload the Document.

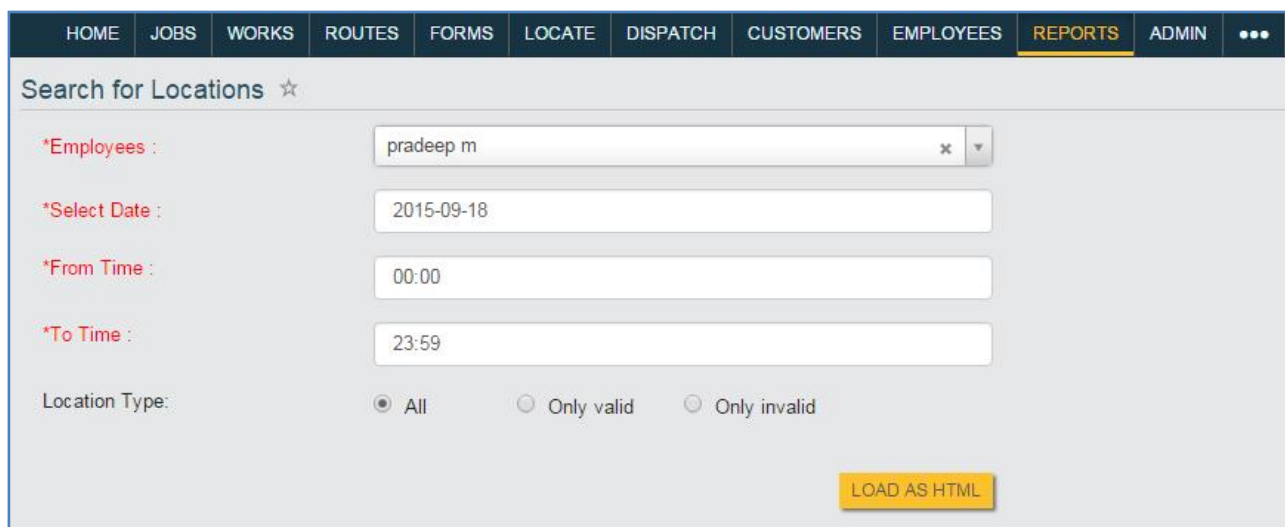
**Navigation:** Admin>>Employees>>Import List Mapping

## Manage Invalid Locations

This is used to track both valid and invalid locations of employee for the selected date.

**Navigation:** Admin>>Employees>>Manage Invalid Locations

**Note:** GPRS (Location services) of Mobile must be on.

The screenshot shows a web application interface for 'Manage Invalid Locations'. At the top is a navigation bar with tabs: HOME, JOBS, WORKS, ROUTES, FORMS, LOCATE, DISPATCH, CUSTOMERS, EMPLOYEES, REPORTS (highlighted), ADMIN, and a menu icon. Below the navigation bar is a search bar labeled 'Search for Locations' with a star icon. The main form contains several input fields: '\*Employees :' with a text box containing 'pradeep m' and a dropdown arrow; '\*Select Date :' with a date picker showing '2015-09-18'; '\*From Time :' with a time picker showing '00:00'; and '\*To Time :' with a time picker showing '23:59'. Below these is a 'Location Type:' section with three radio buttons: 'All' (selected), 'Only valid', and 'Only invalid'. At the bottom right is a yellow button labeled 'LOAD AS HTML'.

*Figure 20: Manage Invalid Locations*

**Step 1:** Select Employee

**Step 2:** Select Date

**Step 3:** Select time Range

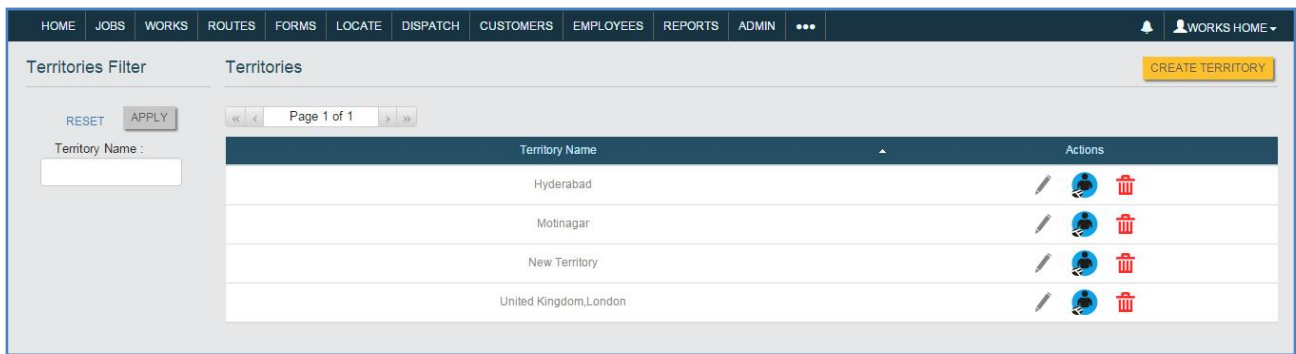
**Step 4:** Set Location type to All (Preferably)

## Territory Management

This is used to restrict an employee for a particular region this region is selected by user on map and assigned to employee. The purpose of restricting an employee to a specific region is to cater customers' actions in that specific region.

**Navigation:** Admin>>Employees>>Territory management

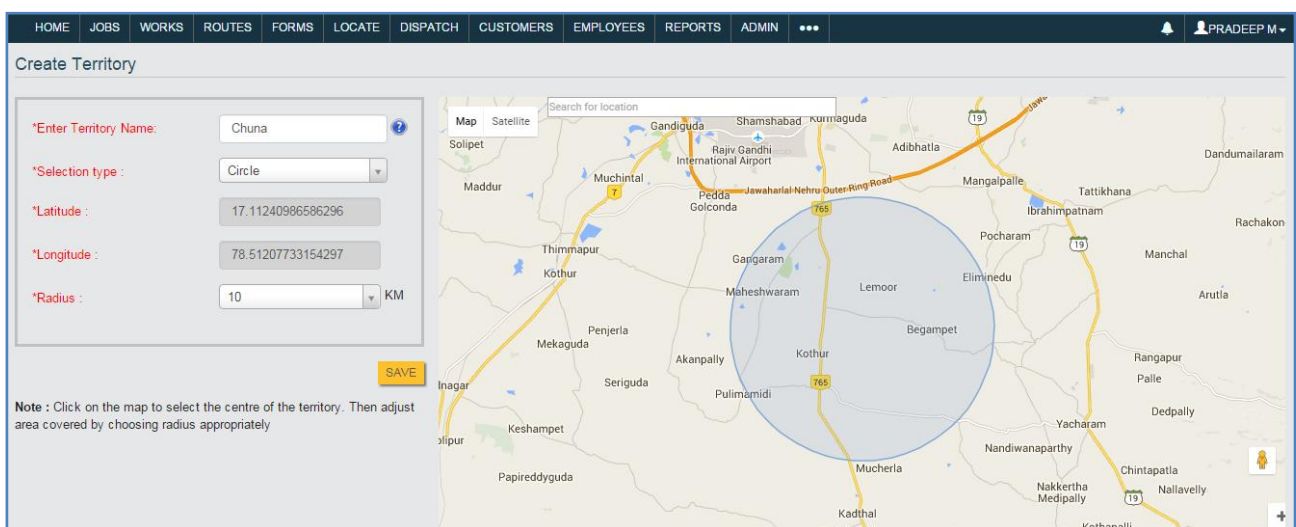




**Figure 21: Territory management**

User can edit/assign/delete territory. Click on “Create Territory” for creating territory. User can also search for territory by entering territory name in the field provided in left pane.

## Create Territory



**Figure 22: Create Territory**

**Step 1:** Enter Territory Name

**Step 2:** Select selection type

**Step 3:** Select Location (Latitude and longitude)

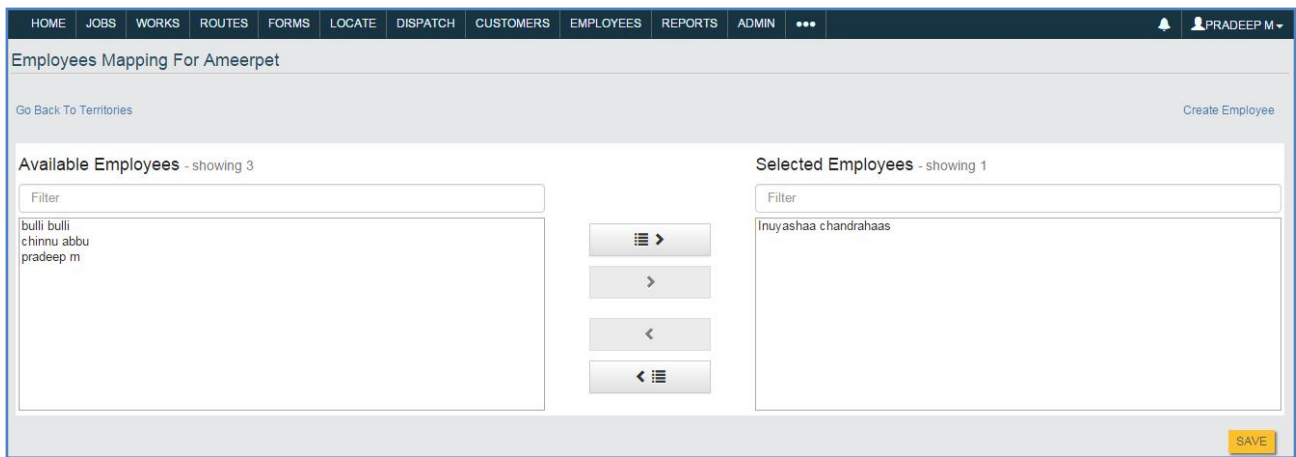
**Step 4:** Select Radius

**Step 5:** Click on Save

Now territory is created, it has to be assigned to employee.

### Assign territory to employee

Click on **Assign button** to assign territory to employee.



**Figure 23: Employee Territory Mapping**

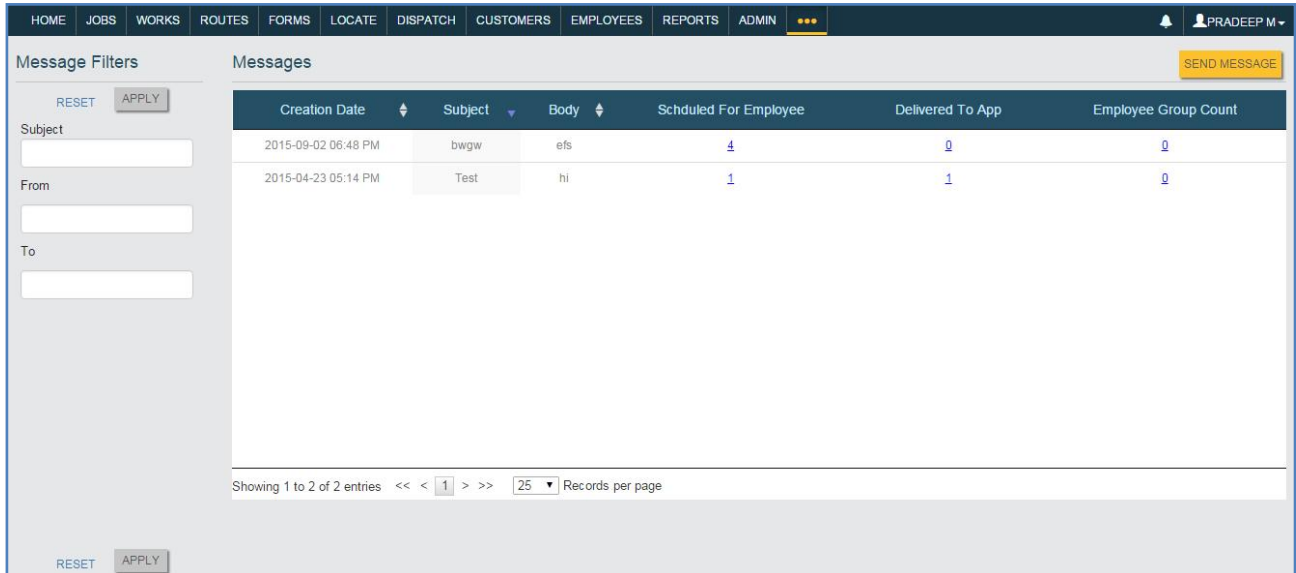
**Step 1:** Select employee and click on right arrow button to add the Employee

**Step 2:** Click on Save

## Send Messages

**Navigation:** Admin>>Employees>>Send Messages (or) click on 3 dots in menu screen>>Send Messages

Web-Panel account user (manager/back office/Root employee) can send messages to field employees these messages are displayed in mobile app under messages module. User can filter messages by applying filters from left pane, filters include subject, from and to date. Enter filter values and click on apply for applying filters, click on reset to clear all filters.



**Figure 24: Send Messages List Screen**

List of sent messages are displayed here. Click on **Send Messages** to send message.

*Figure 25: Send Messages Screen*

**Step 1:** Enter Subject

**Step 2:** Enter Body

**Step 3:** Select type either employee or employee group

**Step 4:** Select Employees by using left & right arrow buttons

**Step 5:** Click on Send, to send message

## Chat Group

List of created chat groups are displayed in this screen. User can edit or disable chat groups by clicking on corresponding options. User can create new chat group by clicking on “Add Employee Chat Group”.

*Figure 26: Chat Group list screen*

Click on “Add Employee Chat Group”

*Figure 27: Create Chat Group*

**Step 1:** Select employee by clicking on employee and click on Right arrow button.

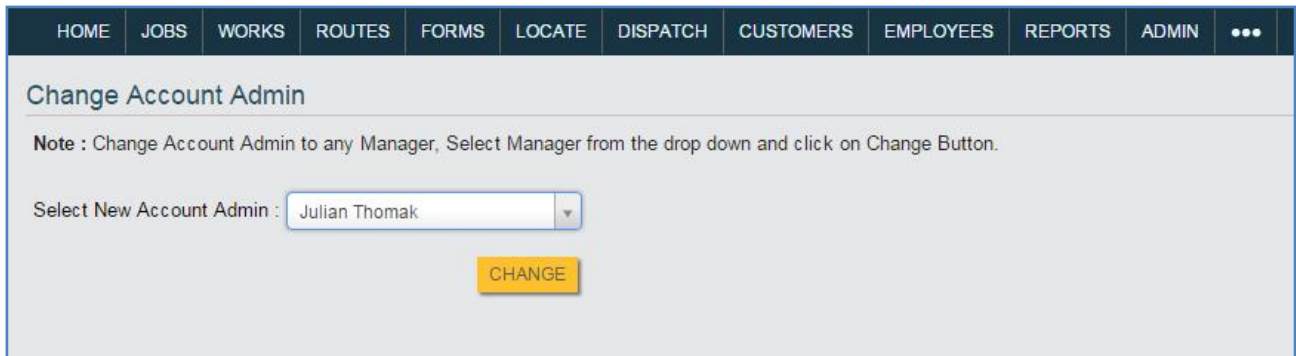
**Step 2:** Enter name to the chat group

**Step 3:** Click on save

## Change Account Admin

This is used to change root employee for company

**Navigation:** Admin>>Employees>>Change account admin



*Figure 28: Change Account Admin*

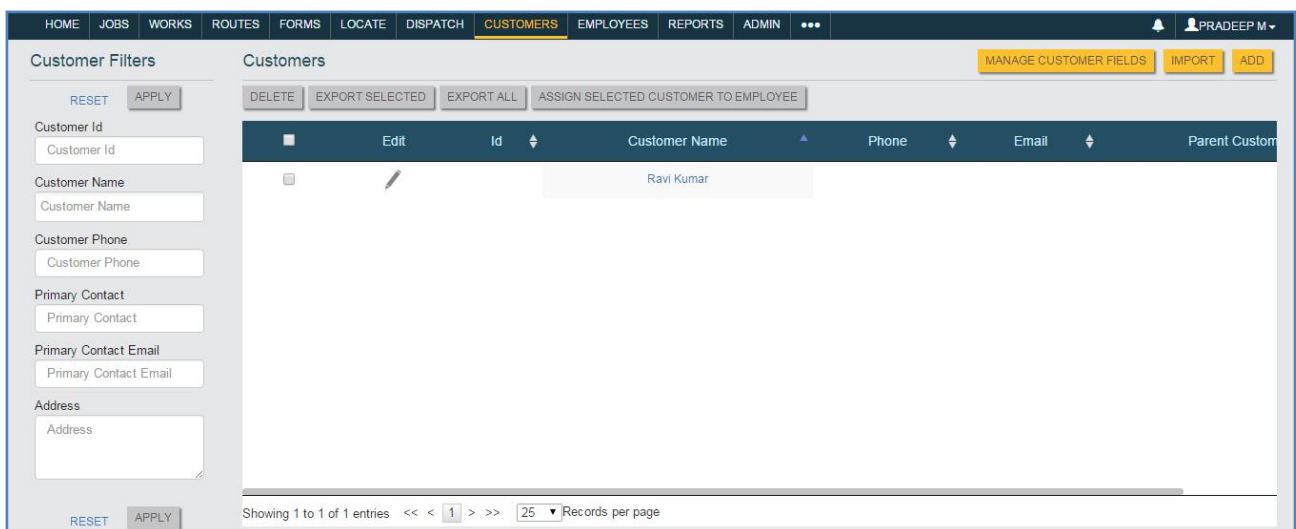
**Step 1:** Select employee from dropdown and click on change.

**Note:** Most of settings are reflected when re-login

## Customers

Customers are used to link the task that you do for a person who might generate revenue for your company. Customers can be individuals or corporate. To give more flexibility EFFORT allows categorization of customers and lets you configure up to two contact details. Customers can be used in a variety of places like jobs, forms, route plans etc.

**Navigation:** Menu bar>>Customers



*Figure 29: Customers list screen*

User can filter customers by applying filters from left pane. Filters include customer id, customer name, customer phone, customer primary contact, customer primary email and customer address. Enter filter values and click on apply for applying filters, click on reset to clear all filters.

### Delete

User can delete customers by selecting the checkbox against customer name and by clicking on delete button.

### Export Selected

This is used to export only selected customers into Excel sheet.

### Export All

This is used to export all customers into Excel sheet.

### Assign Selected Customer to Employee

This is used to assign customer to employee.

### Edit

User can edit customer details by clicking on edit icon.

### Create Customer

Customers can be created through this create customers, choose customer type, fill all the required details, customers can be tagged with text for easy identification, user can use his own custom tags or system defined tags. User can create hierarchies of customers like an organization having multiple unit branches organisation is the root customer whereas branches are the child customer. Customer is also classified into parent & child.

### Customer information

HOME JOBS WORKS ROUTES FORMS LOCATE DISPATCH CUSTOMERS EMPLOYEES REPORTS ADMIN ...

PRADEEP M

### Create Customer

SAVE SAVE & NEW

Customer Information

Customer Details Address

Customer ID: 384834 Street: street

\*Name: Ravi Landmark: Statue

Type: New Area: Madhapur

Phone: 9847858505 City: Hyderabad

Latitude: 18.187606552494625 District: Krishna

Longitude: 78.57421875 Pin code: 5200018

Parent: Penny james State: Andhra Pradesh

Country: India

☐ parent

Figure 30: Customer Information screen

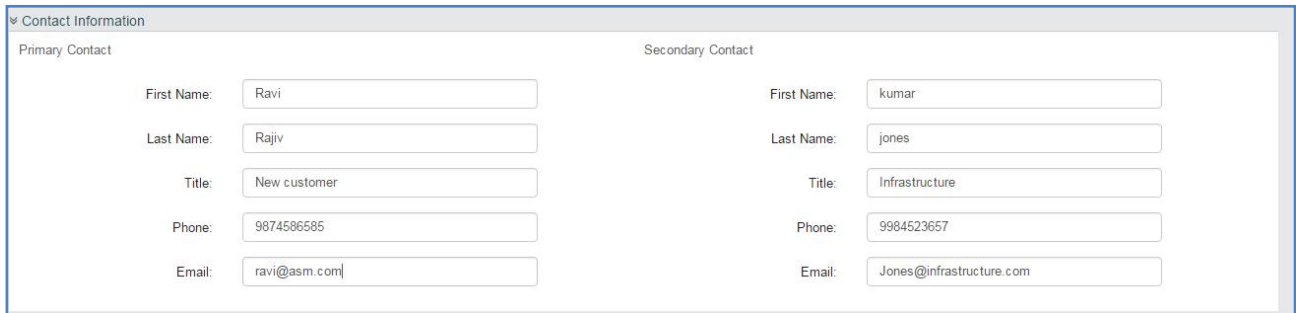
Step 1: Fill required details.

Step 2: Select customer type.

Step 3: User can tag customer with text in custom tags.

Step 4: Click on save.

### Contact Information

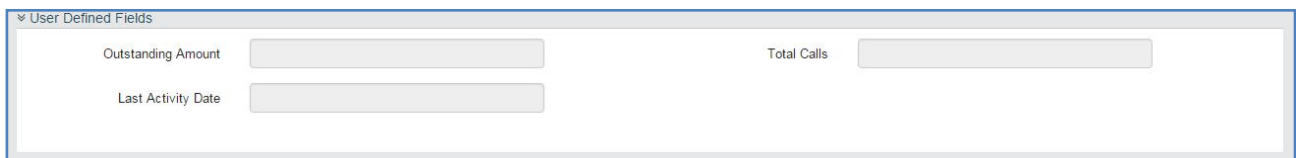


The screenshot shows a 'Contact Information' form with two columns: 'Primary Contact' and 'Secondary Contact'. Each column contains input fields for First Name, Last Name, Title, Phone, and Email. The Primary Contact fields are filled with: First Name: Ravi, Last Name: Rajiv, Title: New customer, Phone: 9874586585, Email: ravi@asm.com. The Secondary Contact fields are filled with: First Name: kumar, Last Name: jones, Title: Infrastructure, Phone: 9984523657, Email: Jones@infrastructure.com.

Figure 31: Contact Information

Enter Primary & secondary contact information of customer, such as first name, last name, title, phone, E-mail.

### User defined fields



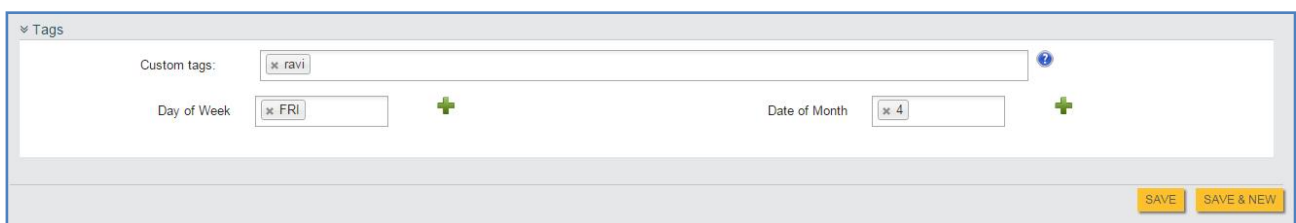
The screenshot shows a 'User Defined Fields' form with four input fields: Outstanding Amount, Last Activity Date, Total Calls, and an unlabeled field.

Figure 32: User Defined fields

These are the user defined fields

### Tags

User can set tags for customers



The screenshot shows a 'Tags' screen with a 'Custom tags' input field containing 'x ravi'. Below it, there are two selection fields: 'Day of Week' with 'x FRI' and a green plus button, and 'Date of Month' with 'x 4' and a green plus button. At the bottom right, there are two buttons: 'SAVE' and 'SAVE & NEW'.

Figure 33: Tags screen

Step 1: Enter custom tag.

Step 2: Select tag for day of week by clicking on + button.

Step 3: Select tag for day of month by se

## View Customers

Displays all the customers which are visible to user based on conditions like employee customer mapping, employees created by sub ordinates and superiors.

Edit	Id	Customer Name	Phone	Email	Parent Customer
		Ravi Kumar			

Figure 34: View Customer screen

List of customers mapped to employee are displayed in this screen. User can filter customers by applying filters from left pane. Filters include customer id, customer name, customer phone, customer primary contact, customer primary email and customer address. Enter filter values and click on apply for applying filters, click on reset to clear all filters.

## Import Customers

This is used to import customers in bulk. Editing or adding new customers in bulk is possible through this feature. Helpful text for importing customers is displayed in the right pane.

Figure 35: Import Customers

## Manage customer fields

This is used to manage customer fields, manage in the sense making fields mandatory or unique etc. User can customize customer fields based on his requirement, user can customize both user defined fields and system defined fields.

**Navigation:** Menu bar>>Customers>>Manage Customer Fields



Figure 36: Manage Customer Fields

## Manage system defined fields

User can manage system defined fields, manage in the sense user can edit system defined fields and can make fields mandatory or un mandatory and can change uniqueness of fields.

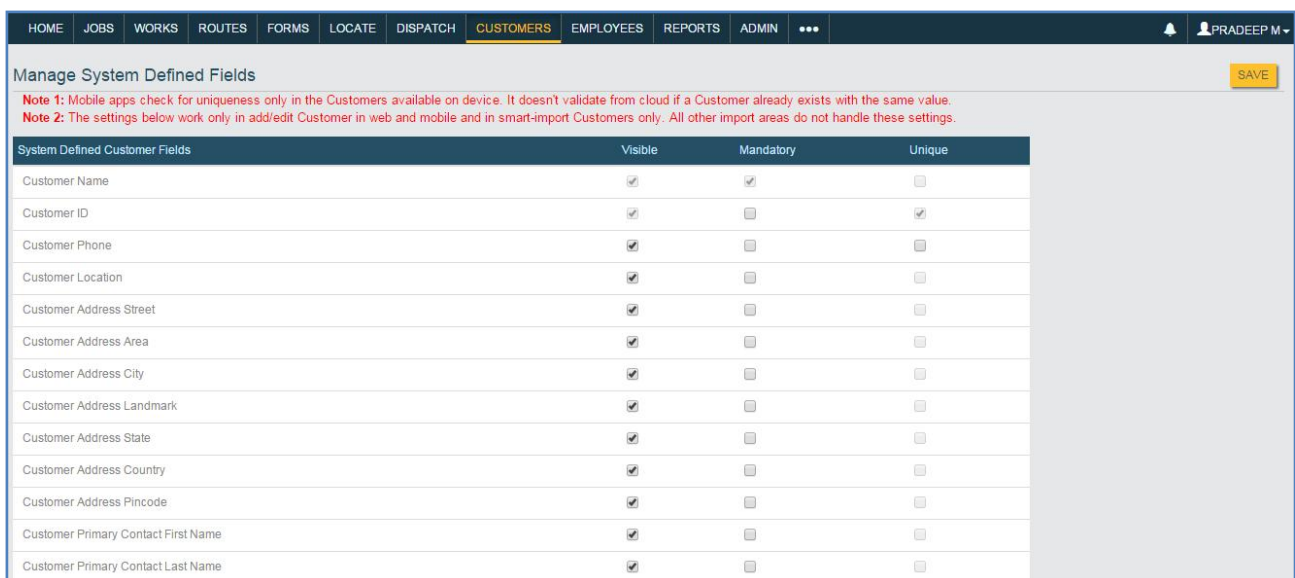


Figure 37: Manage system defined fields

**Step 1:** Select required fields by selecting checkboxes.

**Step 2:** Click on save to reflect selected fields.

## Manage user defined fields

User can manage user defined fields, manage in the sense user can create or edit fields as per requirement.



**Form Template**

Title: Customer form

Page 1

Order	Field Label	Data Type	Computed/Default	Barcode?	Required?	Visible?		
1	Outstanding amount	Currency	none		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
2	Total calls	Number	none		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
3	Last service Date	Date			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
4	Text	Text		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
5	audio	Audio			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
6	country	country			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
7	customer	Customer			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
8	type	Customer Type			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
9	date	Date			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

*Figure 38: Manage user defined fields*

**Step 1:** Add fields/Modify fields as per requirement.

**Step 2:** Click on save to reflect fields.

## View customer details

User can view customer details by clicking on customer name.

**Customer View**

Ravi Kumar  
- New

»Customer Information

»Customer Activities

»Tags

»Customer Hierarchy

EDIT DELETE LOCK ?

*Figure 39: Customer details screen*

Click on required section to view those particular details of customer. User can Edit, delete, lock, add activity to customer and can view employees mapped to customer. User can also view mapped employee to the customer by clicking on respective buttons.

## Import Customer Status

The status of bulk uploading customers can be seen here. Whether the entire employees are uploaded or not status can be checked here.

**Navigation:** Admin>>Customers>>Import Customer Status

## Customer Types

User can create customer types, user can select colour for type so customers who belongs to this type will appear in selected colour on map when locating customers on map.

## Navigation: Admin>>Customer>>Customer Types

ID	Type	Color	Action
161	New	default	

Figure 40: List of customer types

Click on **Add New Customer Type**.

Type Name :

Color :

Figure 41: New Customer type

Step 1: Enter Type Name

Step 2: Select colour

Step 3: Click on Save

## Activities

Navigation: Admin>>Customer>>Customer Activities

User can define Customer activities these activities are Route Plan activities, if it is assigned to employee he can check it in the Mobile app >>Route Plan.

Name	Form Name	Creation Time	Modified Time	Actions
<input type="checkbox"/> cash activity	cash collecting	2015-08-04 08:16 PM	2015-08-04 08:19 PM	
<input type="checkbox"/> Route plan	Delivery	2015-07-15 05:00 PM	2015-07-15 05:00 PM	
<input type="checkbox"/> now	cash collecting	2015-05-11 12:41 PM	2015-05-11 12:41 PM	
<input type="checkbox"/> Collect	cash collecting	2015-04-08 11:52 AM	2015-04-08 11:56 AM	
<input type="checkbox"/> delivery	Delivery	2015-04-07 06:05 PM	2015-04-07 06:05 PM	

Showing 1 to 5 of 5 entries ( Total Pages : 1 ) << < 1 > >> 25 Records per page

Figure 42: Customer Activities

User can manage activities, manage in the sense user can delete or view activities, user can delete activities in multiple or individually by selecting the checkbox and click on delete. Click on create to create new customer activity. User can filter activities by applying filters from left pane, filters include activity name, Enter filter values and click on apply for applying filters, click on reset to clear all filters.

**Figure 43: Create Customer Activity**

**Step 1:** Enter Activity name

**Step 2:** Select the form

**Step 3:** Click on Save

**Note:** Only the forms with Customer Field type will appear in the dropdown.

## Forms

Forms generally represent the gathering of information.

**Figure 44: Forms list screen**

By default forms of all templates are displayed in this screen, user can filter forms by applying filters from left pane. Filter set include Form templates list, filled by, filled between, modified by, modified between. User can delete or reassign forms by selecting the forms and by clicking on corresponding buttons. User can create new form template by clicking on “Create Form Template”. All published form templates are displayed in the right pane. User can view/add forms of a template by clicking on view/Add button. User

can also search for form templates by clicking on by entering form template name in Search bar which is in right pane. On clicking gear icon user will be navigated to form templates list screen

## Forms Map View

User can view the location of filled forms,

The screenshot displays the 'Forms Map View' interface. The top navigation bar includes HOME, JOBS, WORKS, ROUTES, FORMS (highlighted), LOCATE, DISPATCH, CUSTOMERS, EMPLOYEES, REPORTS, and ADMIN. The main area is titled 'Forms Locator' and shows a map with a location pin. On the left, there are search bars for 'Search Form' and 'Search Employee', and a list of form templates with checkboxes. The 'Form Details' section at the bottom shows a table with 'Field' and 'Data' columns.

Field	Data
Text	Title

Figure 45: Forms Map View

Select form by selecting the check box user can also select/unselect all forms by selecting check boxes which at header position beside form search bar, in the same wise user can also select/unselect all employees by selecting checkboxes which are at top header position beside employee search bar. Form filled location is displayed on map and fields which are filled are displayed below map, if location is not captured for form then no location would be shown on map.

## Form Templates

User can create new form template or can use the existing template.

**Navigation:** Menu bar>>Forms>> Gear icon

The screenshot shows the 'Form Templates' screen. On the left is a 'Filters' sidebar with sections for Title, Status (Active/Withdrawn), Published (Yes/No), Created By (Employee Name), and Created between (date range). The main area displays a table of templates with columns: ID, Title, Public, and Actions. The table contains 8 entries. At the bottom, it shows 'Showing 1 to 25 of 35 entries ( Total Pages : 2 )' and a 'Records per page' dropdown set to 25.

ID	Title	Public	Actions
11997	Farmers Visit	YES	[Icons]
11989	Activity Form - Endurance	YES	[Icons]
11533	ABC	YES	[Icons]
11521	New test form	YES	[Icons]
11520	Filter municipalities	YES	[Icons]
11473	auu	YES	[Icons]
11472	page1	YES	[Icons]
11375	Order Booking	YES	[Icons]

**Figure 46: Form Template screen**

Form templates list is shown in this screen, user can apply filters from left pane, Filters set include title, status, published, created by, created between, Enter filter values and click on apply for applying filters, click on reset to clear all filters.

There are 2 Options to create form template. User can create a new template or can create from an existing template.

## Create blank form Template

Click on create blank Form Template

The screenshot shows the 'Create new blank template' screen. It has a title field with 'Testing' and dropdowns for 'Published' (No) and 'Online Form' (No). Below is a section for 'Page 1' with a title field 'Page 1' and buttons 'ADD FIELD' and 'ADD SECTION'. A table lists fields being added:

Order	Title	Field Label	Data Type	Remote Field	Computed/Default	Barcode?	Required?	Actions
1		Name	Text				Yes	[Icons]
2		Contact Number	Number		none		Yes	[Icons]

At the bottom right, there are 'ADD FIELD' and 'ADD SECTION' buttons. At the very bottom, there are 'SAVE' and 'SAVE & NEW' buttons.

**Figure 47: Create New Form template**

**Step 1:** Enter the Title.

**Step 2:** Click on Add Field for adding fields.

**Step 3:** Enter field name and select field type etc.

**Step 4:** Click on Save to save the form template.

User can delete the field by clicking on delete mark.

There are certain actions that can be performed on field in a form they are Computed/Default, Barcode, Required, Advanced.

**Pages:** A form can have one more pages. It means that in the mobile app, each page appears as a tab. This is more suited for lengthy forms or if your form needs to have data segregated properly based on business rules.

**Sections:** Sections is used for grouping similar data together. Section is like a mini form. A section can have one more fields and can be made repeatable. This is best used in the case of an invoice form where we would want to capture all items for a single invoice. You could create a section called items and add fields like item name, description, quantity, price per unit and amount to a section. Now this section can be made repeatable to let users add multiple items to the same invoice.

**Computed field:** The use of a computed field is to have it calculate basic arithmetic on numeric fields. For example, in the invoice case above, the formula for the amount will be price per unit X quantity. There could be another field in which you would want to capture what the total amount for the invoice is (ex. Payable amount). This can be done using the SUM function. The formula for this would be SUM (price per unit X quantity). This will add the amount values of each item added in the invoice and give you the result. Computed fields cannot be edited. They are solely derived from their formula.

**Barcode:** If user needs a bar code for the field then set barcode to YES.

**Required:** If the field in the form or list is mandatory then set required to YES.

**Visibility Restriction:** Whether a field and its values should be not visible to certain employee groups. Default is none. (All employees can view that form).

**Edit Restriction:** Whether value of a field cannot be edited by certain employee groups. Default is none (employees who have view permission can view form and can modify it if they have modify form permission).

**Visibility Dependency:** Whether this field needs to be hidden/disabled based on values in other fields.

**Values Filter:** When the value in a field dictates the values in other list fields. Note: This feature is available only for Lists. Ex: If the mode of transport is a car, then another question that should ask users is what manufacturer do they prefer? (Nissan, Ford, Maruthi and Hyundai, etc.)

**Note:** If user wants to use the form he has to publish the form, set published to Yes.

## Create from Existing template

Click on create new from pre-defined Template

HOME

JOBS

WORKS

ROUTES

FORMS

LOCATE

DISPATCH





















CUSTOMERS

EMPLOYEES

REPORTS

ADMIN

Form Templates

ID	Title	Actions	
288	Customer in Only Section.		 <b>Click here</b>
293	Customer in Only Section.		
300	Customer in Only Section.		
180	FormCopyTest		
289	FormCopyTest kmkl		
294	FormCopyTest kmkl		
301	FormCopyTest kmkl		
291	Multiple Customers Form Template.		
296	Multiple Customers Form Template.		
303	Multiple Customers Form Template.		

**Figure 48: Create From Existing**

**Step 1:** Click on + button

**Step 2:** A popup appears change the name of the form and click on Create

Now the form is created, check it in the form templates now user can customize the fields in it.

### Form Template Helpful Actions

When a form template is saved it shows helpful next actions to perform actions on form template. By clicking on “Go back to form template screen”, user will be navigated to form templates list screen.

HOME

JOBS

WORKS

ROUTES

FORMS

LOCATE

DISPATCH

CUSTOMERS

EMPLOYEES

REPORTS

ADMIN

...

WORKS HOME ▾

Farmers Visit Template Actions

Assign Form Template to Employee Groups

Payment configuration

Mobile Print Format

Manage Lists in Form Template

View Forms Submissions

Manage external Data Source

Configure Follow up for Job/Work

Manage Recipient Email id

Edit Form Template

Assign Workflow

Web Print Format

Withdraw Form Template

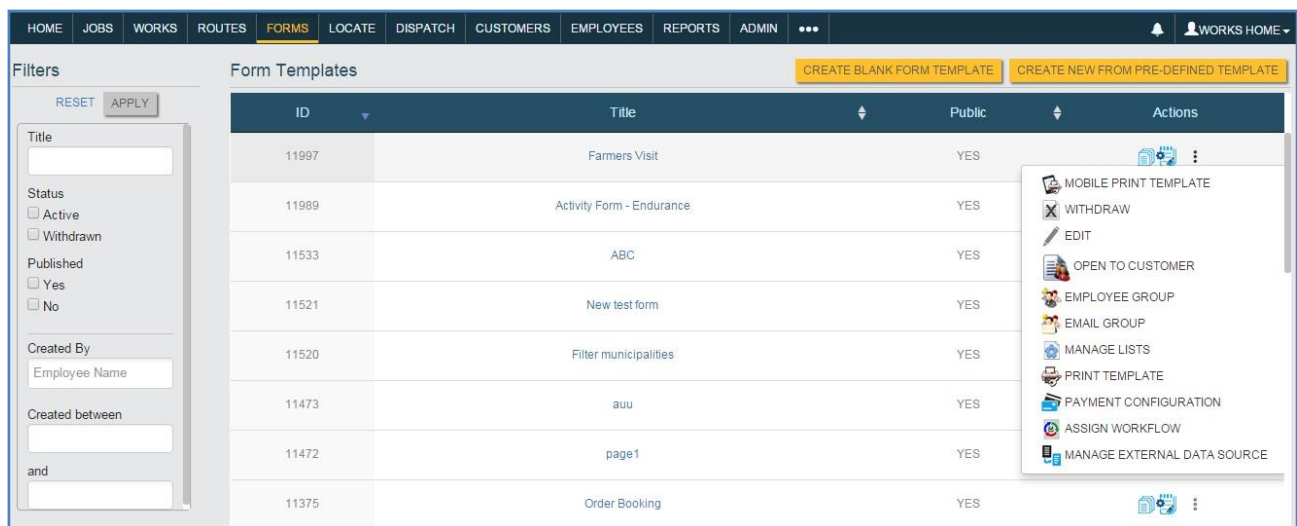
[Go back to Form Template Screen](#)

**Figure 49: Form template next actions screen**

## Actions that can be performed on Form Template

Below listed are the actions that can be performed on a form template.





*Figure 50: Actions on form template*

1. View
2. View Form submission
3. Follow up Job/Work
4. Mobile Print Template
5. Withdraw.
6. Edit
7. Open to customer
8. Employee Group
9. Email to Group
10. Manage Lists
11. Print Template
12. Payment Configuration
13. Assign Work Flow
14. Manage external Data source

### View

To view form, click on form title.

### View Form Submission

It displays the list for number of times the form is filled for.

### Follow up Job/Work

This creates the follow up for job/work. To create a follow up the form must have date field type



assigned to form field name.

Job/Work and Form Mapping

Please Select Follow up type : Work

Follow up Work settings

☐ Create follow up Work when this Form is filled

Select a date field to create follow up Work\*: Due Date

Note: Follow up Work is created only when the user selects a date against that field. Follow up Work is not created otherwise. This is also set as the default Work start date.

Select Work Template: Credit card verification

**SAVE**

*Figure 51: Follow up Job/work*

**Step 1:** Select follow up type to work

**Step 2:** Select the checkbox to create follow up for the work

**Step 3:** Select the template for which follow up has to be created

**Step 4:** Select the appropriate form fields corresponding to work fields

**Step 5:** Finally click on save

**Step 6:** Follow up to job can be done when selected job.

### Mobile Print Template

It is used to set the mobile format in which form can be downloaded (Forms>>Click on form id>> click on Save as PDF or Document) now when save as pdf or document is clicked, file will be downloaded in the user defined format instead of default format, this is for mobile format.

### Withdraw

User cannot delete the form he can only withdraw the form so that it can no longer be used.

### Edit

User can edit form fields and settings.

### Print Template

It is used to set the format in which form can be downloaded (Forms>>Click on form id>> click on Save as PDF or Document) now when save as pdf or document is clicked, file will be downloaded in the user defined format instead of default format.

### Open to Customer

By clicking this form will be visible to the customers who are having web panel Account.

## Employee Group

It is used to assign the form the employee group so the form is visible to that employee group only and only that employee group can access the form.

## Email to Group

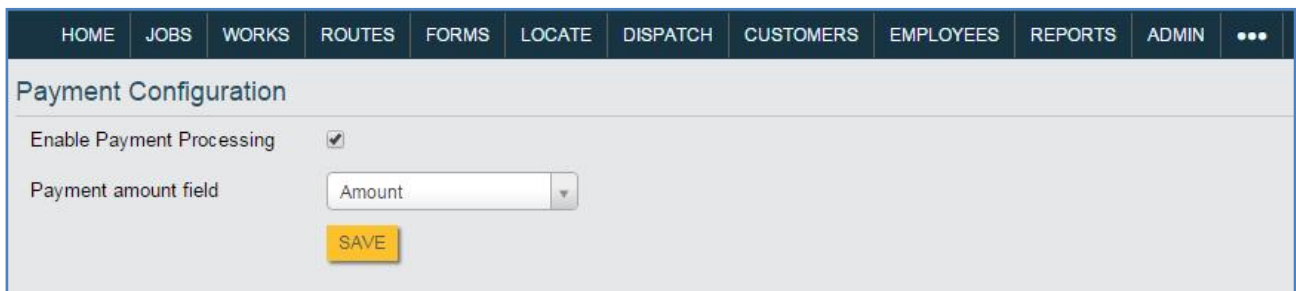
It is used to Email the form to the employee group.

## Manage Lists

Forms that contains list are shown in this manage list section.

## Payment configuration

This option is available for form templates with currency field, this feature is useful for payment processing,



*Figure 52: Payment Configuration*

Step 1: Click on enable payment configuration.

Step 2: Select field, only currency fields in template will appear in the dropdown

Step 3: Click on save,

So when the selected field is filled in a form then payment processing option will be enabled in mobile.

## Assign Work Flow

To assign a workflow first user has to create a work flow. Follow navigation where user can create workflow (admin>>Workflow>>Workflows) and assign it to the form.

## Manage External Data source

This is used to connect Effort with external data source.

## Add Forms

**Navigation:** Menu bar>>Forms

This is used to add forms to Form template.

Form Filters

View Forms

FORMS MAP VIEW CREATE FORM TEMPLATE

Form Templates

Search Form Template...

Activity Form - Endurance

View Add

Activity test with Customer data

View Add

audio and video 1

View Add

auu

View Add

column wrap test

View Add

cust type filter

View Add

Daily Sales Report

View Add

Edit	ID	Title	Template	Filled By	Filled Time	Approval Status	Payment
	266905	Farmers Visit	pavan maganti	2015-09-23 02:27 PM (2015-09-23 11:57 AM)			
	266904	Farmers Visit	pavan maganti	2015-09-23 01:15 PM (2015-09-23 10:45 AM)			
	266903	Farmers Visit	pavan maganti	2015-09-23 01:14 PM (2015-09-23 10:44 AM)			
	266902	Farmers Visit	Works Home	2015-09-23 01:12 PM			
	266901	Farmers Visit	Lava Andriod	2015-09-23 12:46 PM			
	266900	Farmers Visit	Works Home	2015-09-23 11:55 AM			
	266899	Farmers Visit	Works Home	2015-09-23 11:40 AM			
	266898	Farmers Visit	Works Home	2015-09-23 11:25 AM			
	266897	Farmers Visit	Works Home	2015-09-23 11:24 AM			

Showing 1 to 12 of 12 entries ( Total Pages : 1 ) << 1 >> 25 Records per page

Figure 53: Forms List screen

Fill Daily update

SAVE SAVE & NEW

\*\* indicates an title field. \* indicates a mandatory field

Assign To: Kumar varma

Daily work Title: Daily work

Field	Data
Planned Tasks	List Tabular +
Task name	Resource Actual Time Spent(min value= 1, max value= 8)
Task 1	Kiran 7
Un Planned Tasks	List Tabular +
Task Name	Resource Time spent(min value= 1, max value= 8)
Task 2	Ravi 2

SAVE SAVE & NEW

Figure 54: Adding form

Enter form details and select assign to if form need to be assigned to employee and click on save.

## View Form

**Navigation:** Menu bar>>Forms

Click on view in right pane

**Form Filters**

RESET APPLY

**Form Templates**

Search Form Template...

☐ Report On Operation of swimming pool

☐ Audio and video

☐ Audio/video Test

**Filled By**

Employee Name

**Filled between**

and

**Modified By**

Employee Name

RESET APPLY

**View Forms**

FORMS MAP VIEW CREATE FORM TEMPLATE

Click to view forms of a particular template

DELETE REASSIGN

Edit	ID	Title	Template	Filled By	Filled Time	Approval Status	Payment
	3527290	new testing	pradeep spoors	pradeep spoors	2015-09-23 11:09 AM		
	3524674	new testing	pradeep spoors	pradeep spoors	2015-09-22 08:16 PM		
	3230857	Work Report	ravi chand	ravi chand	2015-08-19 10:52 AM		
	3230854	cash collecting	ravi chand	ravi chand	2015-08-19 10:51 AM		
	2905360	cash collecting	pradeep spoors	pradeep spoors	2015-08-05 01:16 PM		
	2905357	Dev Delivery	pradeep spoors	pradeep spoors	2015-08-05 01:16 PM		
	2905114	cash collecting	pradeep spoors	pradeep spoors	2015-08-05 01:02 PM		
	2904266	cash collecting	Kumar varma	Kumar varma	2015-08-05 12:29		

Showing 1 to 25 of 48 entries ( Total Pages : 2 ) << < 1 > >> 25 Records per page

**Form Templates**

Search Form Template...

Report On Operation of swimming pool View Add

Audio and video View Add

Audio/video Test View Add

cash collecting View Add

Daily update View Add

Delivery View Add

Expense Reimbursement View Add

**Figure 55: Forms screen**

This displays forms of a particular type that are available to user and user can edit, delete, and export forms. To view form details click on form ID. All fields of form are displayed in column wise. User can filter forms by applying filters from left pane. Filter set include form fields, filled by, modified by, filled between, modified between, etc.

**Form Filters**

RESET APPLY

**Form Fields**

audio ALL

video ALL

**FilledBy**

Employee Name

**Filled Between**

AND

**ModifiedBy**

Employee Name

**Modified Between**

RESET APPLY

**Audio and video**

ADD FORM IMPORT FORM SHOW FORM TEMPLATE

DELETE EXPORT SELECTED EXPORT ALL

MANAGE COLUMNS

Edit	Payment	Print Status	ID	audio	video	Filled By	Filled Time	Modified By	Modified Time
		Not Printed	2539052	854039	854042	pradeep spoors	2015-07-04 10:07:59	pradeep spoors	2015-07-04 10:09:13
		Not Printed	2539550	854717	854729	pradeep spoors	2015-07-04 10:45:43	pradeep spoors	2015-07-04 10:48:33
		Not Printed	2225469	663705	663708	Kumar varma	2015-06-17 18:44:52	Kumar varma	2015-06-17 18:45:31
		Not Printed	2225535	663722	663725	Kumar varma	2015-06-17 18:46:25	Kumar varma	2015-06-17 18:47:09
		Not Printed	2255181	666329	666332	Kumar varma	2015-06-18 11:23:06	Kumar varma	2015-06-18 11:23:38
		Not Printed	2255712	666386	666389	Kumar varma	2015-06-18 11:27:23	Kumar varma	2015-06-18 11:27:58
		Not Printed	2257945	666676	666678	Kumar varma	2015-06-18 11:44:25	Kumar varma	2015-06-18 11:44:53

Showing 1 to 7 of 7 entries ( Total Pages : 1 ) << < 1 > >> 25 Records per page

**Figure 56: View Forms of a template**

## Add Form

Click on add form for adding form to the template.

## Manage Columns

User can select which columns to be visible and which columns to be invisible.

## Show Form Template

When clicked navigates user to view form template screen.

## Import Forms

Bulk forms can be uploaded in a single go.

**Navigation:** Menu-bar>>Forms

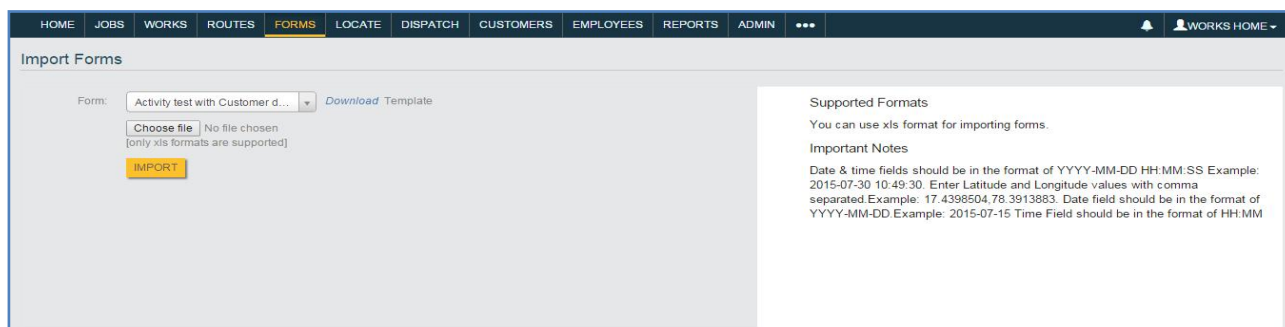


Figure 57: Import Forms

**Step 1:** Download the Template.

**Step 2:** Fill the template and save it.

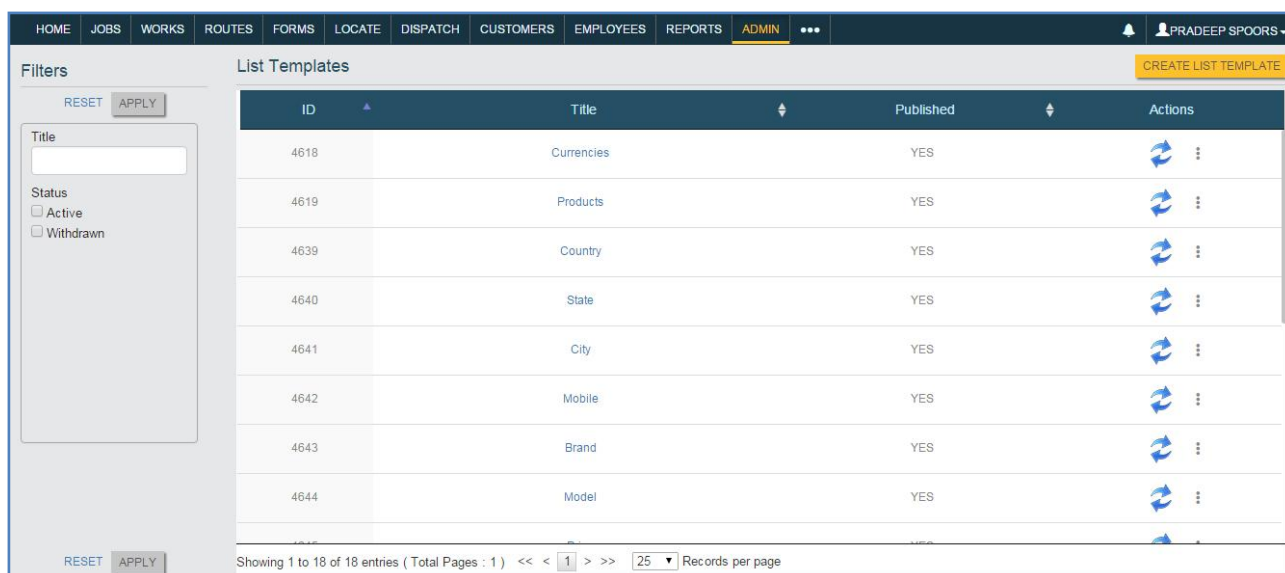
**Step 3:** Click on choose file to choose the file.

**Step 4:** Click on upload to upload the file.

## Lists

List is a field type, user can add multiple values to a list. Lists acts as a dropdown when used in forms and works.

**Navigation:** Admin>>Form>>List



ID	Title	Published	Actions
4618	Currencies	YES	
4619	Products	YES	
4639	Country	YES	
4640	State	YES	
4641	City	YES	
4642	Mobile	YES	
4643	Brand	YES	
4644	Model	YES	

Figure 58: List screen

All list templates are displayed in this screen. User can filter list templates by applying filters from left pane. Filter set include title, status. Enter filter values and click on apply for applying filters, click on reset to clear all filters.

## Create List

Order	Identifier	Field Label	Data Type	Required?
1	<input type="radio"/>	Name	Text	<input checked="" type="checkbox"/>

Figure 59: Create List screen

Step 1: Set Title.

Step 2: Click on Add Field.

Step 3: Enter the Field label, select the data type.

Step 4: Click on Save.

**Note:** Only published forms can be used.

## Actions on list

Following are the actions that can be performed on list

ID	Title	Published	Actions
4618	Currencies	YES	
4619	Products	YES	
4639	Country	YES	
4640	State	YES	
4641	City	YES	
4642	Mobile	YES	
4643	Brand	YES	
4644	Model	YES	

Figure 60: Actions on List

1. View
2. Click to get all lists to sync
3. View items
4. Withdraw
5. View Items
6. Create New Items

## 7. Map Items

### View

Click on list title to displays list fields.

### Click to get all list sync

It syncs all the list items.

### View Items

It is used to check List items.

### Withdraw

Forms which are withdrawn cannot be used any longer.

### Create new list

It is used to add items to the list.

## Import list

**Navigation:** Admin>>Form>>Import List

Bulk List can be imported in a single go.

**Figure 61: Import List**

**Step 1:** Download the template.

**Step 2:** Fill the details in the template and save it.

**Step 3:** Click on choose file to choose the file.

**Step 4:** Click on upload to upload it.

## Import List Status

**Navigation:** Configure>>Form>>Import List Status.

Import list's status is shown here, while bulk uploading the status can be checked here whether Import list status is successful or not.



## Jobs

Jobs are tasks that need to be performed by your field employees in their field visits to customer, deliver an item, get feedback, take a survey and in a lot more cases. Each Job can be further sequenced into a set of sub tasks that help the employee see it as a checklist of items to be done before he/she can complete the main task at hand.

Edit	Title	Customer	Start Time	Employee	Stage At	Complete Time	Repeats	Actions
<input type="checkbox"/>	Apple		2015-09-23 10:45 AM	Lava Andriod	Work flow test (NEW)		Yes	
<input type="checkbox"/>	d10		2015-09-23 02:45 PM	Maksymilian Maria	Work flow test (NEW)		Yes	
<input type="checkbox"/>	title	Kerala Customer	2015-09-23 05:00 PM		order booking		Yes	

Figure 62: Jobs list screen

Jobs of all types are displayed, user can filter jobs by applying filters from left pane, filter set include job types, priority, status, time, when selected manually specify under time date fields will appear, title, employee name, un assigned jobs, customer, address. Enter filter values and click on apply for applying filters, click on reset to clear all filters.

User can also filter jobs based on today, delayed, upcoming, completed, by selecting Dropdown in header. User can reassign, delete, export jobs by selecting the jobs and clicking on appropriate buttons. Job invitations can be seen by clicking on View all job invitations.

## Create Job

This explains how to create a job.



**Figure 63: Create Job screen**

**Step 1:** Fill all the required details.

**Step 2:** Click on Save.

## Import Jobs

Bulk jobs can be created at once.

**Figure 64: Import Jobs**

**Step 1:** Download template.

**Step 2:** Fill required fields in the template.

**Step 3:** Upload the document.

## Job Invitation

Job invitations can be sent to employee group, any member of the group can accept invitation. Then job gets created, job is visible only to the employee who accepts job invitation. List of job invitation are displayed. User can filter job invitations by applying filters from left pane. Job types are displayed in the right pane, click on add in right pane to add job for that type user can also search job types using the search bar in right pane. Click on Gear icon to view List of job types.

Edit	Title	Customer	Type	Start Time	End Time	Assigned To
	Accept on Demand	UI team	Job	2015-01-23 12:30 AM	2015-01-23 01:30 AM	Lava
	test job	ITC_ITC1p_ITC1c	Job	2015-09-04 05:45 PM	2015-09-04 06:45 PM	

Figure 65: Job Invitation list

User can also create new job invitation from create Job option.

## Create Job Invitation

Figure 66: Create Job Invitation

Step 1: Fill all the required Fields.

Step 2: Enter the pin code you have set for creating the employee group.

Step 3: Click on save.

## Import Job & Form

Jobs and forms can be imported by this.

**Figure 67: Import Job & Form**

**Step 1:** Download the template.

**Step 2:** Fill the details.

**Step 3:** Upload the document.

## Job Settings

**Navigation:** Menu-bar >>Forms

Click on gear icon in forms screen to go to job settings, before creating a job its type has to be created and also it's stages has to be created, job type defines what type of job to be performed and job stages defines tasks to be done during the completion of the job.

Edit	ID	Name	Stages
	1250	Job	1. Start 2. End
	1252	cash collect	1. Start 2. Collector Form 3. End
	1801	new Type	1. Start 2. Collector Form 3. End

Edit	ID	Name
	2358	Start
	2359	End
	2362	Collector Form
	2485	new

**Figure 68: Job Settings**

**Create a job type:** Job type can be created in two ways

- 1) By creating a new job type.
- 2) Editing the already existing job type.

**Create a job Stage:** Job stage can also be created in two ways.

- 1) By creating a new job stage.
- 2) Editing the already existing job stage.

**Note:** It is preferable to create a job stage before you create a job type so that you can use the job stage in your job type.

**Creating a Job Type:**

**Figure 69: Create Job Type**

**Step 1:** Enter the Name Field.

**Step 2:** Select the stage you want to have in your job type this can be done by selecting the stage in left box and click right arrow button.

**Step 3:** To remove the stage select the stage in right column box and click left arrow button.

**Step 4:** Click on save to create job type.

User can create follow up job for job type, select check box for follow up and select job type.

## Editing Job Type

**Figure 70: Editing Job Type**

**Step 1:** Click on edit button in job type.

**Step 2:** Select the required states by selecting forms and press right arrow mark button.

**Step 3:** After completion click on save.

**Step 4:** Select create follow up job if required.

**Step 5:** If create follow up job type is selected, then select the follow up job type.

**Step 6:** Finally click on save.

User can create follow up job for job type.

## Creating a new job stage

User can create a new job stage

**Click on add stage.**

The screenshot shows the 'Create Job Stage' form in a web application. The top navigation bar includes links for HOME, JOBS, WORKS, ROUTES, FORMS, LOCATE, DISPATCH, CUSTOMERS, EMPLOYEES, REPORTS, and ADMIN. The user's name, PRADEEP SPOORS, is visible in the top right corner. The form itself has a title 'Create Job Stage' and two buttons: 'SAVE' and 'SAVE & NEW'. The form fields are as follows:

- \*Name:** A text input field containing 'New Job Stage'.
- Form:** A dropdown menu showing 'Expense Reimbursement' with a link to '[Add Form Template]'.
- Min Form submissions:** A numeric input field set to '1'.
- Max Form submissions:** A numeric input field set to '1'.
- Form Auto Fill:** A section with a checked checkbox 'Enable Form Auto fill from Job' and a note: '(Note: Auto fill only works for Customer, Date, Phone, Text, and Time field types in Form.)'.

Below these fields is a table with three columns: 'Form Fields', 'Job Fields', and 'Pick another customer?'. The table contains two rows of data:

Form Fields	Job Fields	Pick another customer?
Itemized Expenses-Date	Job Start Time	
Itemized Expenses-Description	Job Description	

At the bottom right of the form, there are two buttons: 'SAVE' and 'SAVE & NEW'.

**Figure 71: Creating New Job stage**

**Step 1:** Enter Job Type.

**Step 2:** Create your own form template or select from the dropdown.

**Step 3:** Fill all the details and select the stage you created.

**Step 4:** Select “enable form auto fill from job” check box for auto populating forms fields data to job.

**Step 5:** Click on save.

## Edit Job Stage

**Edit Job Stage** SAVE

\*Name:

☒ Mandatory to complete Job

☐ is revisitable

Form:  [\[Add Form Template\]](#)

Min Form submissions:

Max Form submissions:

Form Auto Fill

☒ Enable Form Auto fill from Job (Note: Auto fill only works for Customer, Date, Phone, Text, and Time field types in Form.)

Form Fields	Job Fields	Pick another customer?
Employee Id	<input type="text" value="Job Title"/>	
Employee Name	<input type="text" value="Job Description"/>	
Customer Name	<input type="text" value="Customer"/>	<input checked="" type="checkbox"/>
one	<input type="text" value="Phone"/>	

**Figure 72: Edit Job Stage**

**Step 1:** Click on edit stage

**Step 2:** Select the Form from the form dropdown

**Step 3:** Select “enable form auto fill from job” check box for auto populating forms fields data to job

**Step 4:** Click on save

**Form Auto Fill:** If enabled corresponding form fields are filled with the job fields, in the sense job fields will be copied to form fields.

**Step 1:** Select the type in the drop down in Job fields section against the form fields

**Step 2:** Click on **save or update** button

## Area Groups

User can create a job and can assign it to an Employee Group. Employee group is assigned with a pin code.

**Navigation:** Admin>>Jobs>>Area Group

**Area Groups** ADD NEW AREA GROUP

Edit	ID	Group Name	Actions
	74	All groups	

**Figure 73: list of Area Groups**

List of area groups are displayed in the screen, click on add new area group.

*Figure 74: Create Area group*

*Step 1:* Enter group Name.

*Step 2:* Select group by clicking on Right Arrow.

*Step 3:* Enter strictly valid pin code.

*Step 4:* Click on Add.

*Step 5:* Click on Save.

In Create job>> use this pin code by unselecting address same as customer, this job is now sent to the employee group anyone from the group can accept the job.

## Dispatch

**Navigation:** Menu bar>>Dispatch

All unassigned jobs and works are shown here. Unassigned jobs/works for the day can be assigned to the employees. Employees can be filtered based on city by selecting check box against filter by city and employees who are in leave on the day are shown in red color. User can also include completed jobs and works by selecting checkbox against them.

User can drag & drop jobs/works to the time slot against employees, job/work will automatically assign to employee in the dropped time slot. Option to create new job/work is available in left pane. User can also search for employees by using the search bar above employees list in left pane.

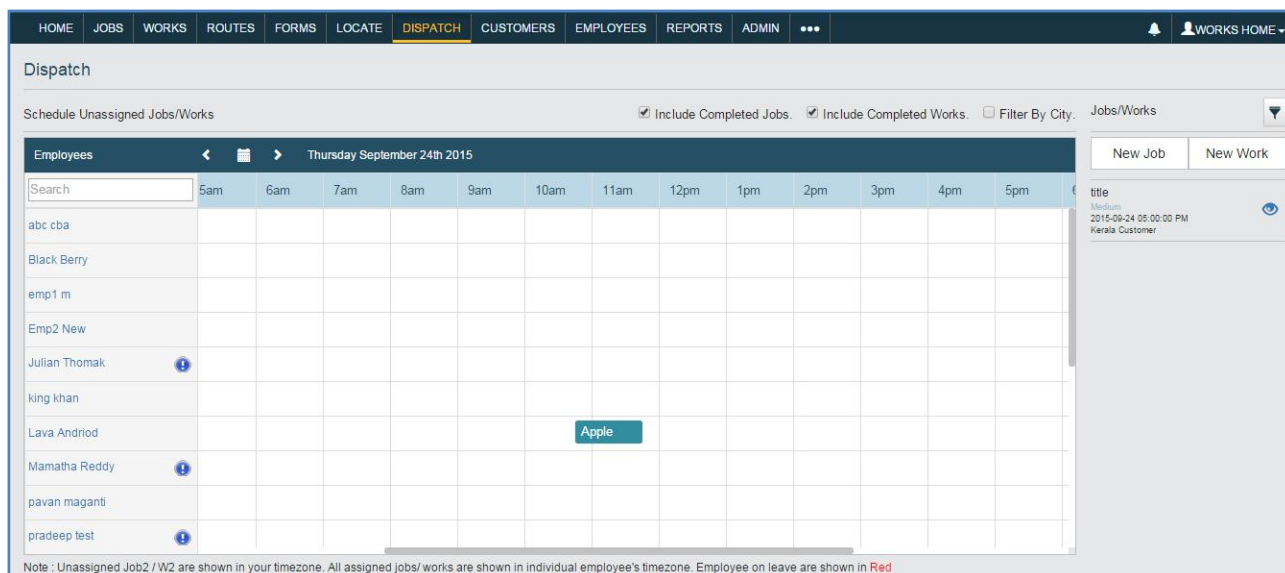


Figure 75: Dispatch screen

## Auto dispatch

All unassigned jobs are shown here. Unassigned jobs can be assigned to employees. Route to jobs from employee home/work location can be optimized by optimize route.

**Navigation:** Menu bar >>3 dots >>Auto Dispatch

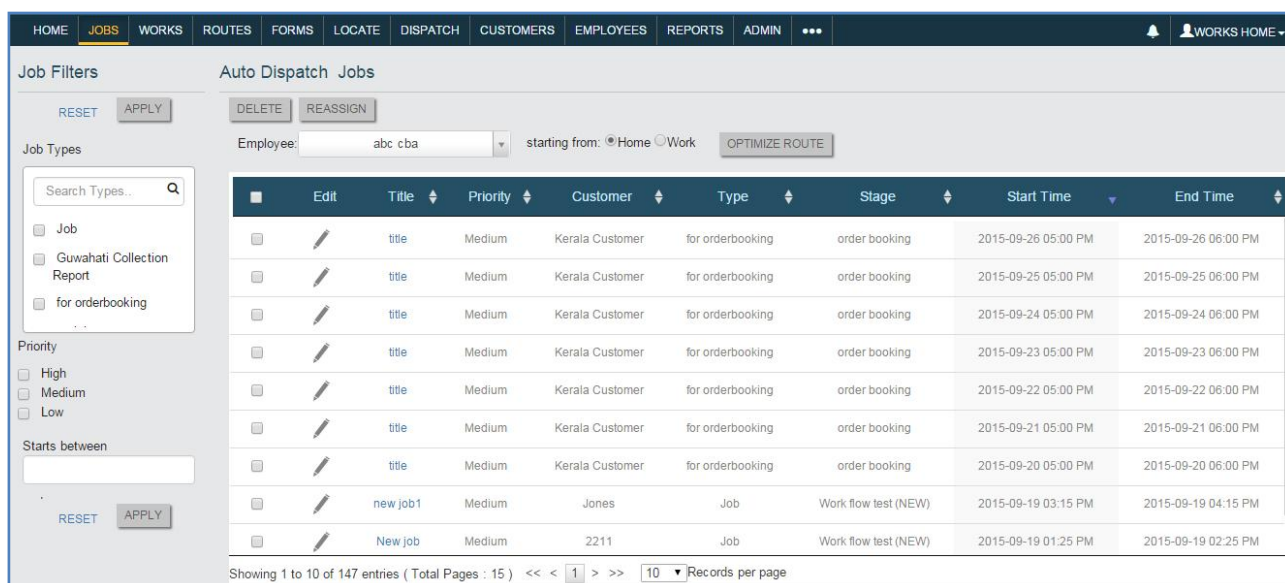
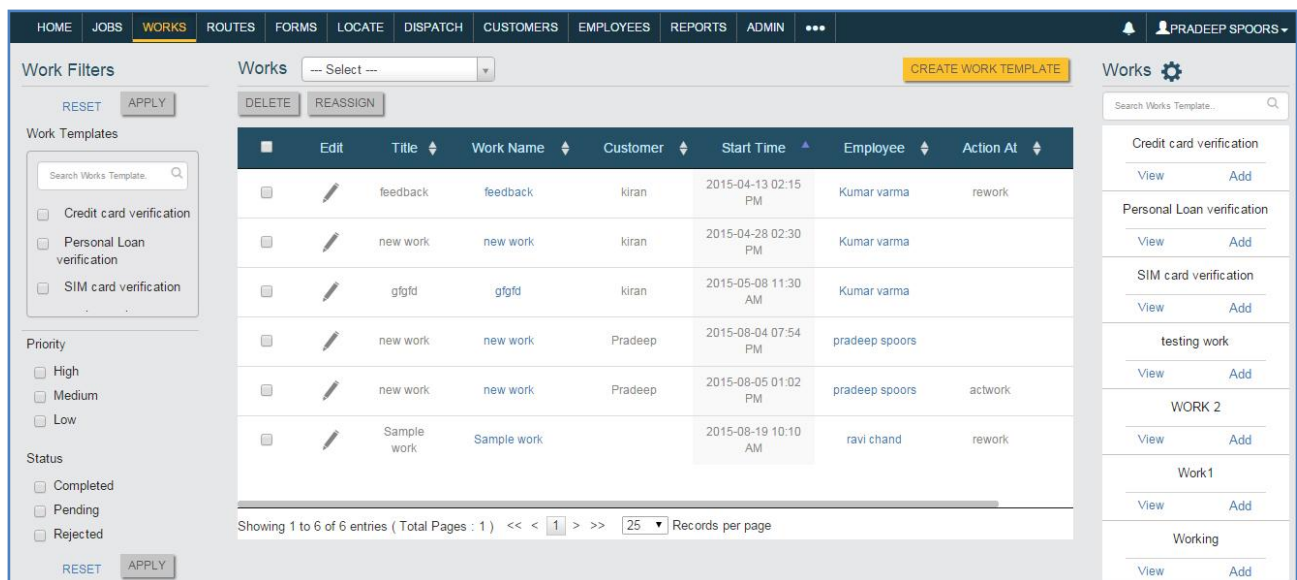


Figure 76: Auto Dispatch

## Works

Generally a work can be defined as a step by step procedure for completing a task. Here also same wise, as there will be certain activities to be performed in a step by step manner to complete the work, these activities are defined by the user.





**Figure 77: Works screen**

All works & work templates are displayed in this screen, user can filter works by applying filters from left pane. Filter set include work template list, priority, status, starts between, ends between and work template name. User can delete or reassign works by selecting works and clicking on appropriate action button. User can select works for today, upcoming, completed, rejected, delayed. List of all work templates are visible in right pane, user can add/view work of a template. When clicked on gear icon in right pane user will be navigated to list of work templates screen. User can create work template using “Create Work Template” option.

## Creating a work Template

The following below Content describes you how to create a work Template.

**Navigation:** Menu bar>>Works>>Create New Template.

**Figure 78: Creating work Template**

**Step 1:** Enter Work Name and Work Description fields

**Step 2:** Click on Add Action, to add the Activities or Actions that need to be performed in this work

**Step 3:** Enter data in row-wise order, Action title is mandatory

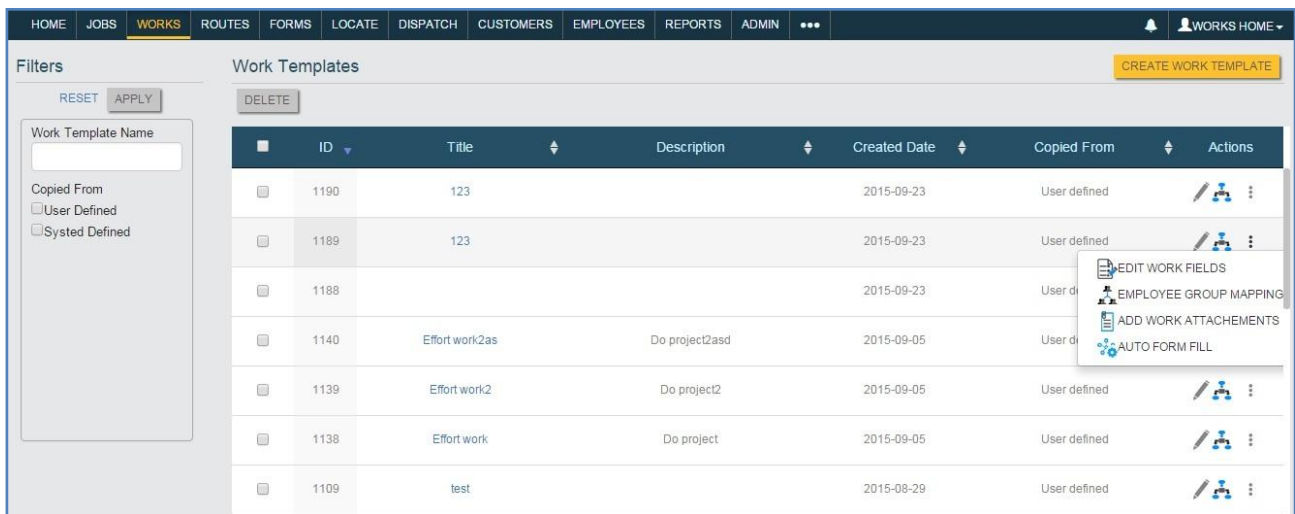
Step 4: Select the Form template from dropdown

Step 5: Click on Delete row for deleting the particular row

Step 6: Finally save the work by clicking on Save

**Note:** In **Form Templates** Dropdown, the forms which appear are the forms which, user had already created and published, user can select a form of his wish from the dropdown which is required to complete the work. User can select only a single form at a time, the forms which are selected becomes the **Activities**.

## Actions that can be performed on the work



The screenshot shows the 'Work Templates' section of a software interface. It includes a navigation bar at the top with tabs like HOME, JOBS, WORKS, ROUTES, FORMS, LOCATE, DISPATCH, CUSTOMERS, EMPLOYEES, REPORTS, and ADMIN. Below the navigation bar, there's a 'Filters' section on the left with 'RESET' and 'APPLY' buttons, and a 'Work Template Name' search box. The main area displays a table of work templates. A dropdown menu is open over the 'Actions' column of the first row, showing options: EDIT WORK FIELDS, EMPLOYEE GROUP MAPPING, ADD WORK ATTACHEMENTS, and AUTO FORM FILL.

ID	Title	Description	Created Date	Copied From	Actions
1190	123		2015-09-23	User defined	[Edit] [Flow] [More]
1189	123		2015-09-23	User defined	[Edit] [Flow] [More]
1188			2015-09-23	User d	[Edit] [Flow] [More]
1140	Effort work2as	Do project2asd	2015-09-05	User d	[Edit] [Flow] [More]
1139	Effort work2	Do project2	2015-09-05	User defined	[Edit] [Flow] [More]
1138	Effort work	Do project	2015-09-05	User defined	[Edit] [Flow] [More]
1109	test		2015-08-29	User defined	[Edit] [Flow] [More]

Figure 79: Work template actions

1. Edit
2. Edit Work Flow
3. Edit work fields.
4. Employee Mapping.
5. Add Work Attachments.
6. Auto Form Fill.
7. Delete.

### Edit

User can edit the Work Template by clicking on the Edit button.

### Edit work Flow

User can set the order for the forms i.e. what should be next activity for the first form.

**Figure 80: Manage Work Flow**

**Step 1:** Select Starting point by selecting the check box in the start action. This will become the first activity

**Step 2:** Click on Edit mark in Next Actions to set the Next action for the first activity

**Step 3:** At the last action or activity select the checkbox in End Action

**Create Rule:** Advance settings can be done here, visibility etc.

**Next Process:** This is to add another work sheet to this work i.e. to link another work with the current work as a Next Process or Next Activity to the current activity.

## Edit Work Fields

By default system creates a form which contains basic form fields; user can use them or add additional fields.

## Employee Mapping

The works which user has created need to be mapped or to be assigned to an employee or Employee group.

**Figure 81: Employee Mapping**

**Step 1:** Select the Employee group on the left side under available groups

**Step 2:** Click on Right arrow mark, it will be selected

**Step 3:** To Unselect, Select the employee group under Selected groups and click on left arrow button.

**Step 4:** Click on Save.

### Add Work Attachment

User can add attachments for the works, these attachments are forms which were created and published by user.

HOME JOBS **WORKS** ROUTES FORMS LOCATE DISPATCH CUSTOMERS EMPLOYEES REPORTS ADMIN ...

Mapped Form templates for testing work

Available FormTemplates - showing 13

Filter

- Report On Operation of swimming pool
- Audio and video
- Audio/video Test
- Delivery
- Supervisors check list/ Maintenance Schedule
- Swimming pool day wise monthly report
- Weekly Chemical Maintenance Log
- Work Report
- cash collecting
- new testing
- neww
- testing

Selected FormTemplates - showing 5

Filter

- Daily update
- Expense Reimbursement
- Fecal incident Response log
- Sales Quotation
- Swimming pool and spa self inspection check I...

SAVE

**Figure 82: Add Work Attachment**

**Step 1:** Select form under Available Form templates and click on right arrow button.

**Step 2:** To unselect, select form under selected form templates and click on left arrow button.

**Step 3:** Click on Save to save the attachments.

### Auto Form Fill

Fill the form fields with the appropriate type.

HOME JOBS **WORKS** ROUTES FORMS LOCATE DISPATCH CUSTOMERS EMPLOYEES REPORTS ADMIN ...

Work-Form Auto Fill Configuration

Name	Actions
actwork	
working	
rework	

Auto fill Form from Work

☐ Enable Form Auto fill from Work

Form Fields	Work Fields	Change Customer?
Employee id	Phone Number	
Employee Name	Employee	
Customer Name	Customer	<input checked="" type="checkbox"/>
Amount	Pincode	
Date	Starts	
Customer number	Pincode	
one	Pincode	

SAVE OR UPDATE

**Figure 83: Auto Form Fill**

**Step 1:** Click on the Auto form fill button

Step 2: Now a form appears, select the corresponding type for each field

## Delete

User can delete the work by selecting work and click on delete button.

## View

User can view work by clicking on the work title.

## Add Work

**Navigation:** Menu bar>>Works

Click on add under work template in right pane.

Figure 84 shows the 'Works' navigation screen. The interface includes a top navigation bar with tabs like HOME, JOBS, WORKS, ROUTES, FORMS, LOCATE, DISPATCH, CUSTOMERS, EMPLOYEES, REPORTS, and ADMIN. Below the navigation bar, there's a 'Work Filters' section on the left with fields for 'End Between', 'Work Name', 'Employee', 'Customer', and 'Address'. The main area displays a table of work entries with columns: Edit, Title, Work Name, Customer, Start Time, Employee, and Action At. A red arrow points to the 'Add' button in the right pane, which is labeled 'Click here to add work'.

Figure 84: Add Work navigating screen

Figure 85 shows the 'Add Work' form. The form is divided into two columns. The left column contains fields for 'Work Name' (PJP), 'Starts' (2015-09-24 14:36), 'Customer' (Jones), 'Address same as customer?' (Yes), 'Area', 'Landmark', and 'Pincode'. The right column contains fields for 'Description', 'Ends' (2015-09-24 15:00), 'Employee' (Black Berry), 'Priority' (Medium), 'Phone Number' (8106566989), 'Street', 'City', 'Country' (Select), 'State', and 'Location' (Lat, Long). At the bottom, there's a checkbox 'This is a recurring Work' and two buttons: 'SAVE' and 'SAVE & NEW'.

Figure 85: Add Work

Fields that are shown here are of default, User can alter these fields by Clicking on **Edit Work Fields**, this is discussed above in “Edit work fields”.

**Step 1:** Fill all the required fields to create the work

**Step 2:** Select the Customer in the dropdown

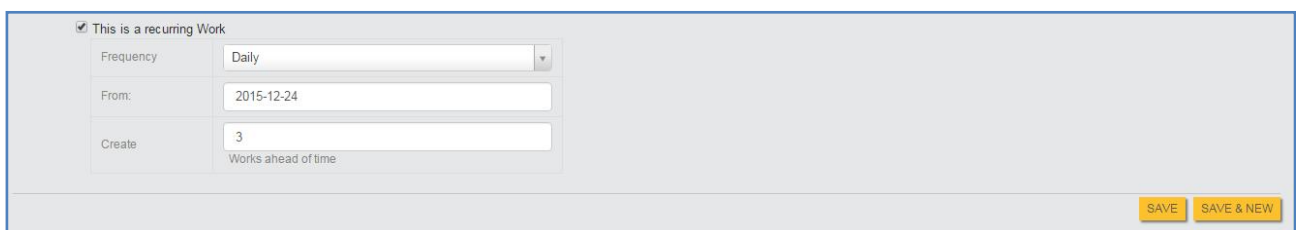
**Step 3:** Select the employee to assign the work

**Step 4:** If the address is same as customer address then set address same as customer to Yes

**Step 5:** Select the checkbox if the work is a recurring work

## Recurring Work

Recurring works can be done on Daily and Weekly basis.



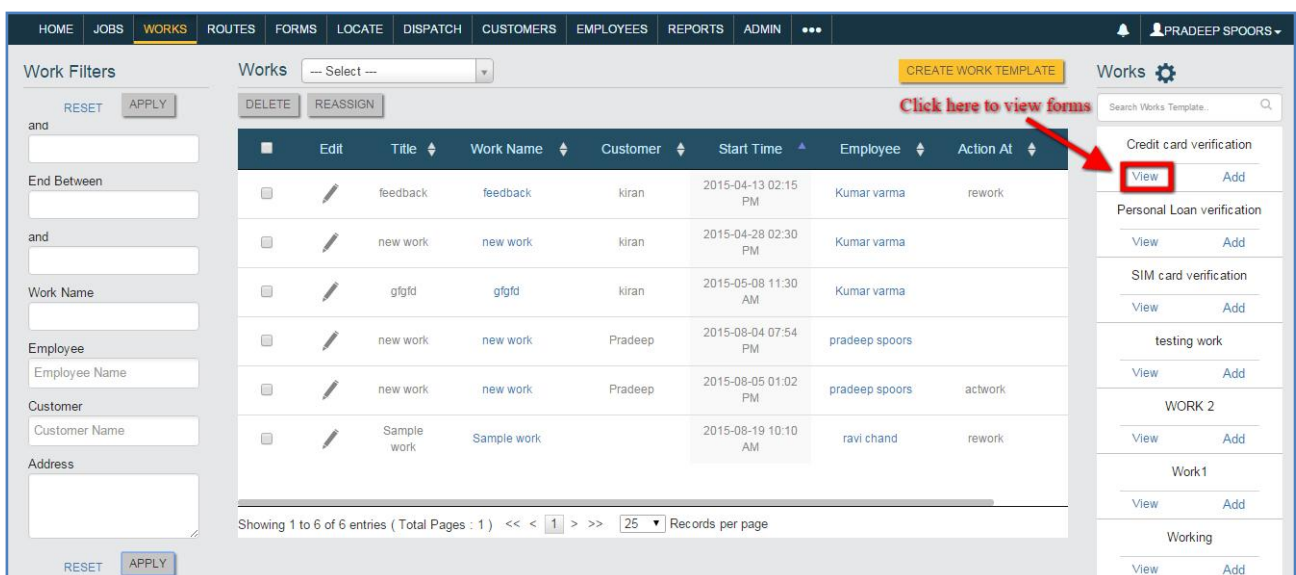
*Figure 86: Recurring Work*

**Step 1:** Select whether work to be weekly or monthly.

**Step 2:** Select date and no of times work to be recurring.

## View Work

To View created works.



*Figure 87: View Work navigating screen*

**Figure 88: View Works**

Submitted works can be seen here in the above figure, option to import works and create work template are available at top right of the screen, user can filter works by applying filters from left pane and also user can select status of works such as today's works, completed works, delayed work, upcoming work, rejected work .

## Import work

Bulk works can be uploaded at a single go.

**Figure 89: Import Work**

**Step 1:** Download the Template

**Step 2:** Fill all the required fields

**Step 3:** Upload the file

## Rejected work

Work is usually assigned by user (Manager or back office employee) to field employee or employee group, employee can reject the work. Those rejected works appears in this Rejected works page.

## Work Template Helpful Actions

When a work template is saved it shows helpful next actions to perform actions on work template. By clicking on "Go back to work template screen", user will be navigated to work templates list



screen.

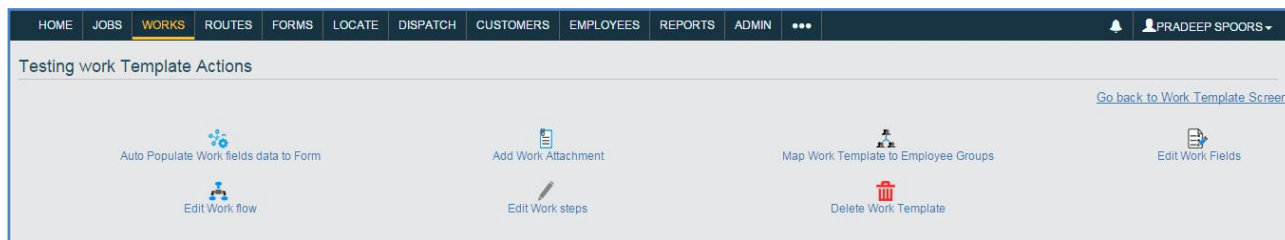


Figure 90: Work template next actions screen

## Route Plan

Route Plan is defined as the area of customers for which an employee must visit to complete the job. Purpose of Route Plan is for prioritizing of jobs.

All assigned Route Plans are displayed in this screen.

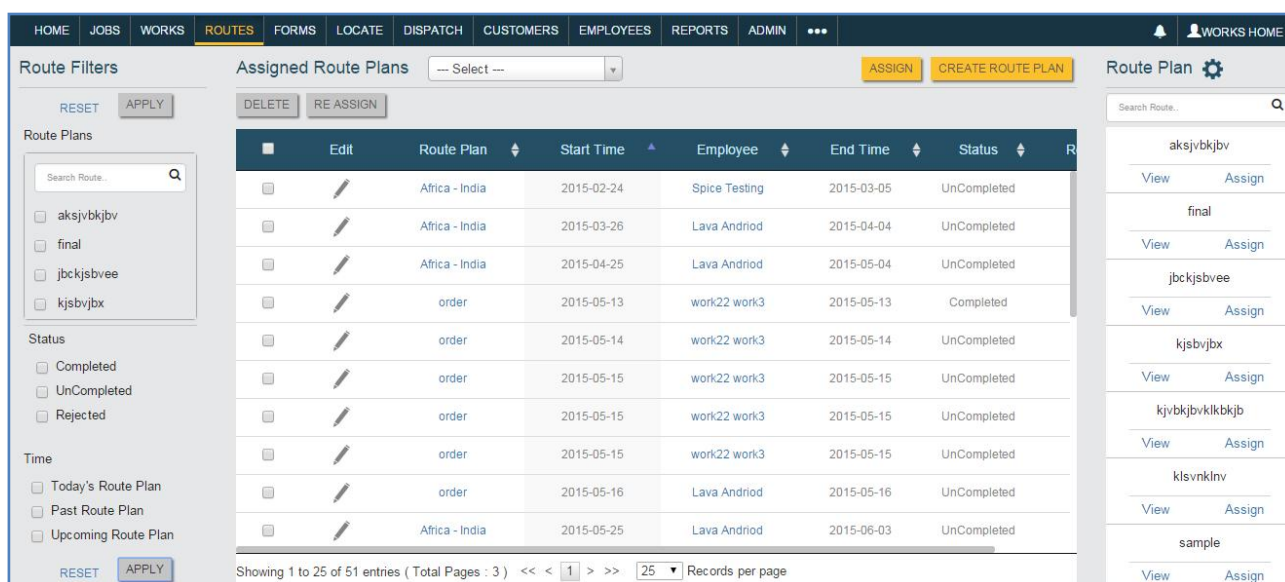


Figure 91: Route Plan

User can filter route plans by applying filters from left pane, filter set include Route plans lists, status, time and employee name. Enter filter values and click on apply for applying selected filters, click on reset to clear all filters. Option to create and assign route plan are available at top right of middle pane. User can delete or can re-assign route plan to employee, user can also sort routes based on today, delayed, upcoming, rejected, completed. List of route plans are displayed in right pane. User can also search for route plans using search bar in right pane. Click on gear icon to view all route plans. User can view or assign route plan by clicking on corresponding view/assign options available in right pane.

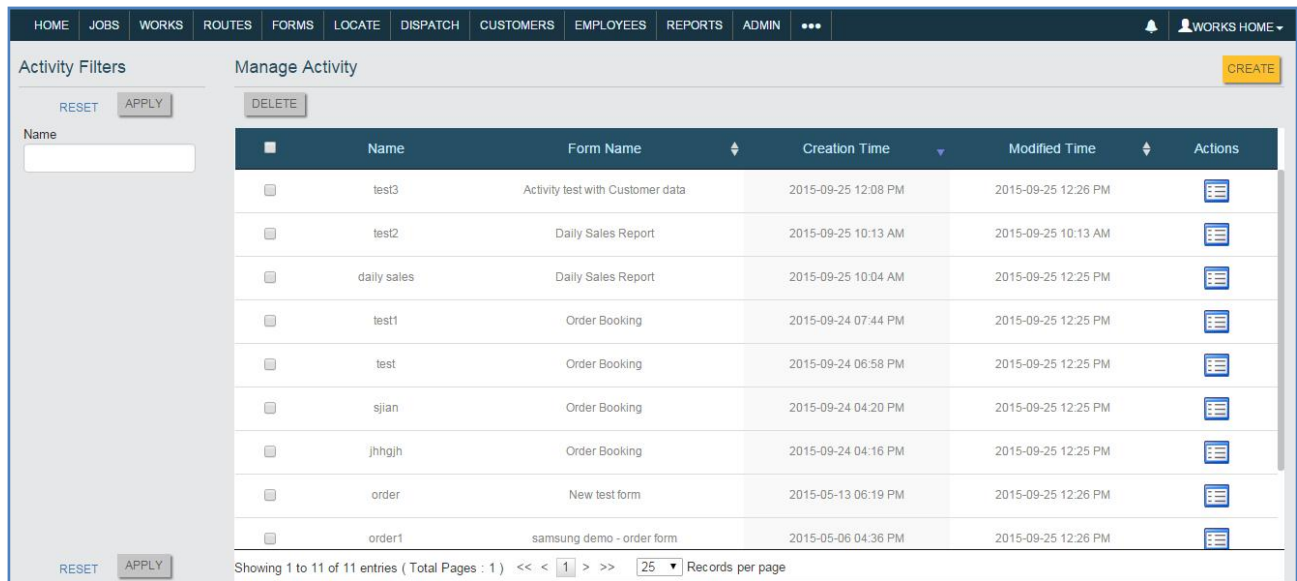
## Activities of a Route plan

A Route Plan should have activities, these activities are performed at the customer location to complete the task assigned to the employee, and these activities are forms that are selected as per the Requirement.



## Creation of Activities

**Navigation:** Admin>>Customer>>Activities



The screenshot shows the 'Manage Activity' interface. On the left, there are 'Activity Filters' with a 'Name' search box and 'RESET'/'APPLY' buttons. The main area is a table with columns: Name, Form Name, Creation Time, Modified Time, and Actions. The table lists 11 activities. At the bottom, there is a pagination bar showing 'Showing 1 to 11 of 11 entries (Total Pages : 1)' and a 'Records per page' dropdown set to 25.

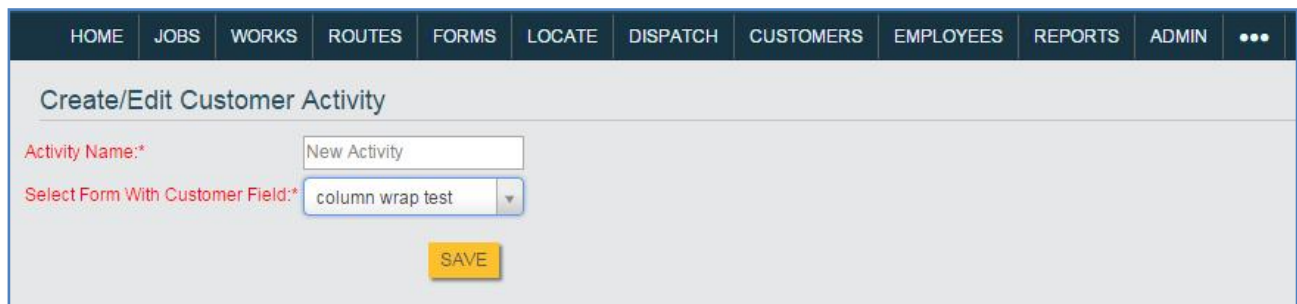
Name	Form Name	Creation Time	Modified Time	Actions
test3	Activity test with Customer data	2015-09-25 12:08 PM	2015-09-25 12:26 PM	[Icon]
test2	Daily Sales Report	2015-09-25 10:13 AM	2015-09-25 10:13 AM	[Icon]
daily sales	Daily Sales Report	2015-09-25 10:04 AM	2015-09-25 12:25 PM	[Icon]
test1	Order Booking	2015-09-24 07:44 PM	2015-09-25 12:25 PM	[Icon]
test	Order Booking	2015-09-24 06:58 PM	2015-09-25 12:25 PM	[Icon]
sjian	Order Booking	2015-09-24 04:20 PM	2015-09-25 12:25 PM	[Icon]
jhhgj	Order Booking	2015-09-24 04:16 PM	2015-09-25 12:25 PM	[Icon]
order	New test form	2015-05-13 06:19 PM	2015-09-25 12:26 PM	[Icon]
order1	samsung demo - order form	2015-05-06 04:36 PM	2015-09-25 12:26 PM	[Icon]

**Figure 92: List of activities screen**

List of activities are displayed in this screen, user can filter activities by applying filter from left pane. Click on create to create activities.

### Create Activities

Click on create button



The screenshot shows the 'Create/Edit Customer Activity' form. It has two mandatory fields: 'Activity Name:\*' with a text input containing 'New Activity', and 'Select Form With Customer Field:\*' with a dropdown menu showing 'column wrap test'. A yellow 'SAVE' button is at the bottom.

**Figure 93: Create activity screen**

**Step 1:** Set name for Activity, this is Mandatory field.

**Step 2:** Select Form from the dropdown.

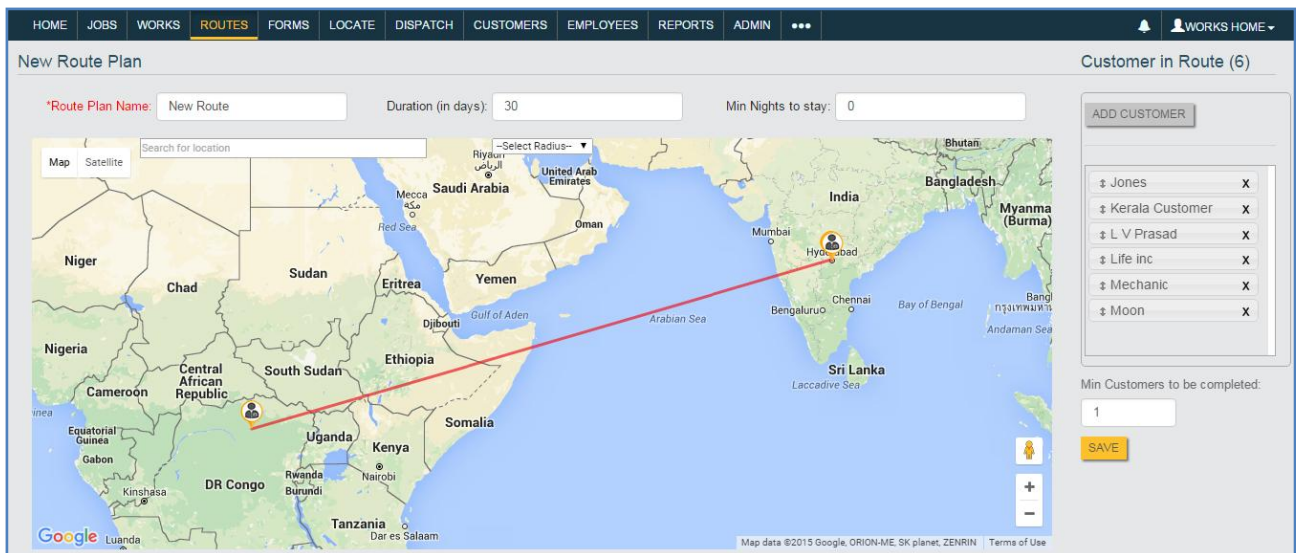
**Step 3:** Click on save.

**Note:** Forms which contain **Customer data type** are only shown in the dropdown.

## Creation of a Route plan

First in order to use Route plan user has to create a Route plan.

**Navigation:** Menu bar>>Routes>>Plans



*Figure 94: Create Route plan*

Step 1: Click on Create.

Step 2: Name the Route plan.

Step 3: Days required completing the Route Plan.

Step 4: Minimum customers to be covered if minimum customer's condition is not met. Then user cannot complete the route plan.

Step 5: User can add any number of customers by clicking on **Add Customer**. It is preferable to have two or more customers.

Step 6: Click on Save the Route Plan.

**Note:** Once Route plan is created user has provision to edit or to remove the Route plan.

## Assigning Route plan

Once a route plan is created it has to be assigned to an employee for completion of it.

**Navigation:** Menu-bar>>Route Plans>> Assign

Click on assign.

HOME JOBS WORKS **ROUTES** FORMS LOCATE DISPATCH CUSTOMERS EMPLOYEES REPORTS ADMIN ...

### Assign Route Plan

\*Route Plan: sample View Route Plan

\*Employee: Black Berry

\*From: 2015-09-25

☒ This is a recurring route assignment

\*Frequency: Weekly

\*From: 2015-09-25

\*Assign: 3 routes assignments ahead of time

ASSIGN

*Figure 95: Assign Route Plan*

**Step 1:** Select Route plan from dropdown.

**Step 2:** Select Employee to whom Route Plan should be assigned

**Step 3:** Select from date.

**Step 3:** Select the check box if it is a route plan needs to be Recurring

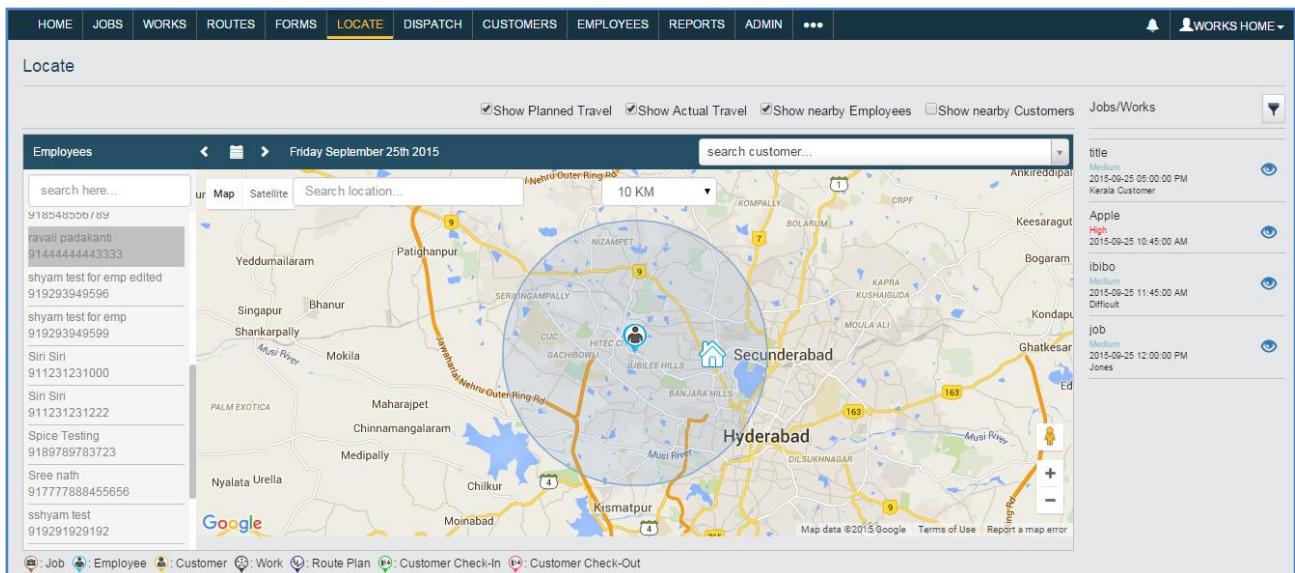
**Step 4:** Select the date and finally click on Assign.

User can view route plan by clicking on view route plan, now this Route plan will appear in the employee's mobile app, employee may accept or reject route plan.

## Locate

To track and employee location, and to locate customer on map this feature is useful and Route plans are shown here in the map.

**Navigation:** Menu-bar>>Locate.



**Figure 96: Locate screen**

User can track employees locations under him, user can search for employee using search bar in left pane under employees, click on employee to track locations, employees home location is displayed on map if employee home location is under selected radius, option to select radius is at top center of map user can select radius in KMs, user can also search for customer by selecting customer from dropdown.

**Show Actual Travel:** The Distance Travelled by the employee on that particular day is shown in the map with blue line.

**Show Planned Travel:** Planned travel of employee is displayed on the map.

**Show nearby Employees:** Displays the employees who are within the selected range.

**Show nearby Customers:** Customer type can be selected here and searching is done on the basis of customer type.

Jobs/works for the selected date are displayed in right pane. When clicked on eye icon job/work details are displayed in new tab. User can filter customers based on name and priority by using filter button.

## Knowledge base

**Navigation:** Menu bar>>3 dots>> Knowledge base

Knowledge base acts as a repository for you to store videos, training content, new product offerings, etc. Each article can be shared with a Group of employees. An article can contain a file, a media item or a pdf file.

All the Files and folder which have been uploaded and created are displayed in this screen, user can filter files and folders by applying filters from left pane. User can edit or delete files and

folders by selecting the check box and clicking on appropriate buttons. User can download files by clicking on download icon.

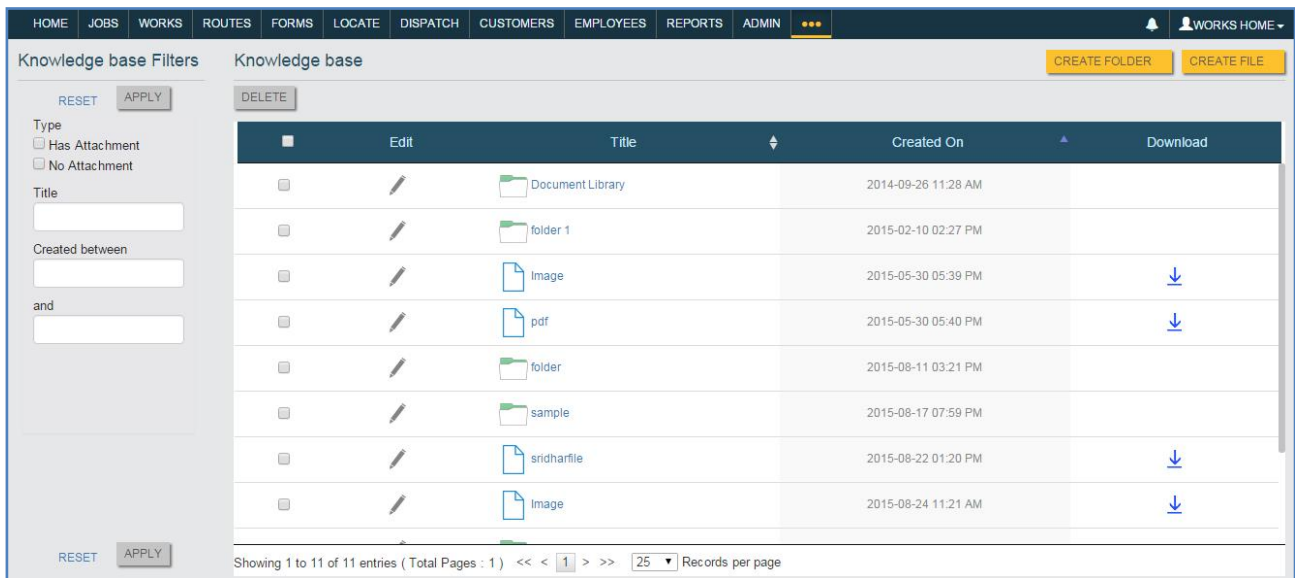


Figure 97: knowledge Base

User can create folder or file by clicking on appropriate button

### Create Folder

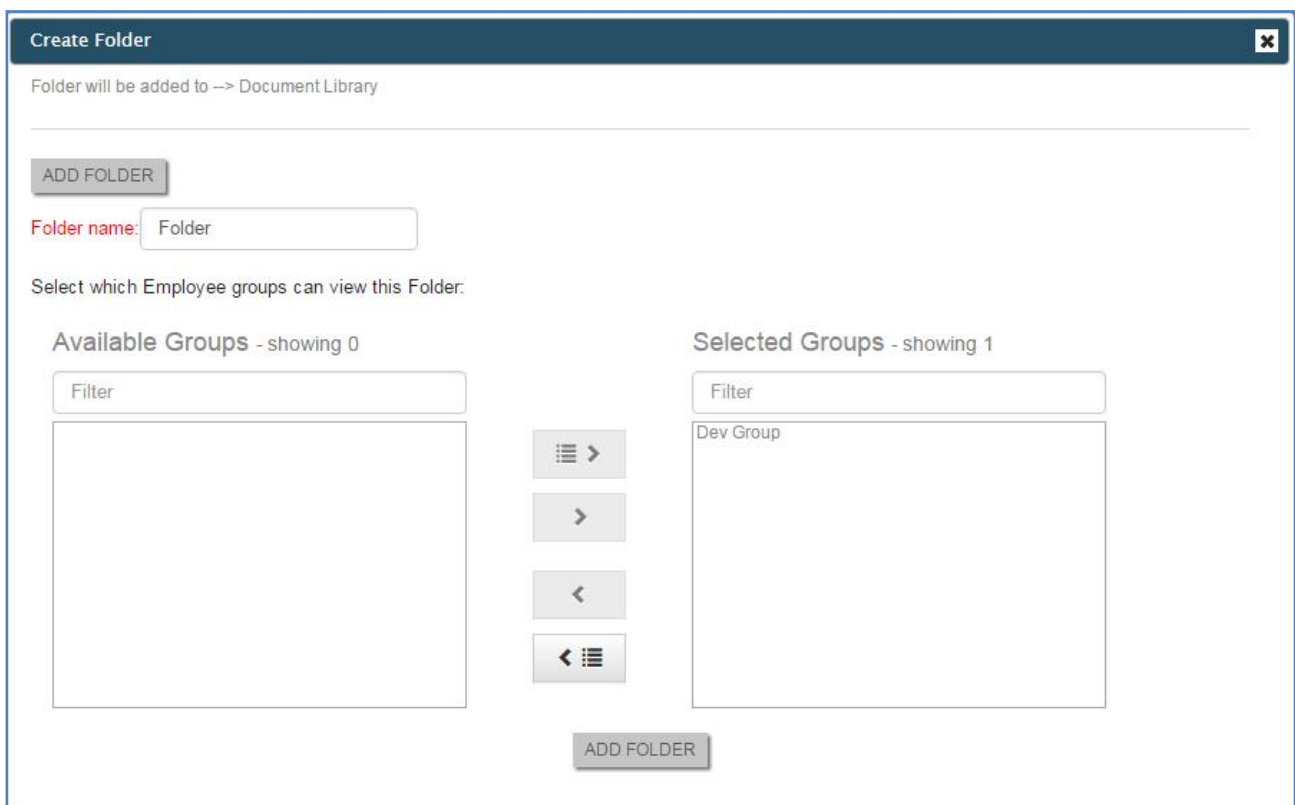


Figure 98: Create Folder

Step 1: Enter Folder Name.

Step 2: Select Employee Group by clicking on employee group under all and click on right arrow button.

Step 3: To unselect employee group, click on employee group in selected groups and click on left arrow button.

Step 4: Click on add folder button.

User can add files and folder inside a folder.

## Create File



The screenshot shows a web form titled "Create Article". At the top left is a button labeled "SHARE THIS ARTICLE". Below it is a red asterisk followed by the label "\*Title:". To the right of this is a text input field labeled "Title". Below the title field is a larger text area labeled "Description/Message:". Below the description area is a "File:" label. To its right is a "Choose file" button and the text "screenshot-n... 14-10-25.jpg". Below the file section is a checkbox labeled "Make this article secure". At the bottom is the text "Select which Employee groups can view this article:". The form has a dark blue header bar with the title "Create Article" and a close button (X) on the right.

*Figure 99: Create File*

Step 1: Enter Title.

Step 2: Click on choose file to select file.

Step 3: Select Employee Group.

Step 4: Select make secure this article checkbox if article needs to be secure.

Step 5: Click on share article to share article with employee group.

## Company

### Mobile Configurations

Settings for Mobile App can be done here.

**Navigation:** *Admin>>Company>>Mobile Configurations*

## Customer Settings

The screenshot shows the 'Customer Settings' page within a 'Mobile Configuration' dashboard. The top navigation bar includes links for HOME, JOBS, WORKS, ROUTES, FORMS, LOCATE, DISPATCH, CUSTOMERS, EMPLOYEES, REPORTS, ADMIN, and a user profile for PRADEEP SPOORS. The 'Customer Settings' section includes the following options:

- Enable pre-fetching nearby Customers:** Checked.
- Within:** 10 (in KM).
- Limit to:** 10 Customers.
- Customer Search criteria (Check all fields which you want to search in):**
  - Customer Name: ☐
  - Customer No: ☐
  - Primary Contact First Name: ☐
  - Primary Contact Last Name: ☐
- Approximate time spent at customer:** 15 minutes.
- Number of customers each employee can Lock:** 10.
- Enforce Customer Check-in to perform activities:** ☐
- Location Proximity Check to perform activities:** ☐ Within: 50 Metres.

An 'APPLY' button is located in the top right corner of the settings panel.

Figure 100: Customer Settings

Adjust the settings as per the requirements and click on Save

## Location settings & Media settings

The screenshot shows the 'Location Settings' and 'Media Settings' sections of the mobile configuration interface.

**Location Settings:**

- Comment Location Timeout:** 5 (In minutes).
- Location Shelf Life:** 10 (In minutes).
- Form Location Update:** ☐ Only in Form submit. ☒ On every update.
- Capture Media Locations:** ☐.
- Location strictness for activities:** Location Service Optional.
- Auto filter customers based on system tags:** ☐.
- Location Services required for Sign In / Sign Out:** Capture Location If Available.

**Media Settings:**

- Compress Medias:** ☒.
- Can Pick Media from gallery:** ☒.
- Snap Front-camera photo when capturing signature:** ☒.

Figure 101: Location settings & Media settings

Adjust the settings as per the requirements and click on Save.



## Update/Reminder/Limits & App Settings

HOME	JOB	WORK	ROUTE	FORM	LOCATE	DISPATCH	CUSTOMER	EMPLOYEE	REPORT	ADMIN	...
------	-----	------	-------	------	--------	----------	----------	----------	--------	-------	-----

### Update/Reminder/Limits

Send Version Update: ☐ ?

App Un used Duration:  (In Days)

Stop work reminder after:  ?

No. of days history to be synced first time:

Max Number of Days For Day Plan Creation:  (In Days)

### App Settings

Default App Screen:  ?

App Title:  ?

Show Completed Jobs: ☒ ?

Hide Customer Info: ☐ ?

Default Search for Forms:

Figure 102: Remainder & App settings

Adjust the settings as per the requirements and click on Save.

## Bluetooth Printer Settings

Bluetooth Printer	
Printer Service RecordUuid:	<input type="text" value="00001101-0000-1000-8000-00805F9B34FB"/> ?
Printer Label Width :	<input type="text" value="12"/> ?

Figure 103: Bluetooth Printer settings

## Logos

Logo is a representation or identification of a company, in this section user can change logo for the company.

**Navigation:** Admin >> Company >> Logos

HOME	JOB	WORK	ROUTE	FORM	LOCATE	DISPATCH	CUSTOMER	EMPLOYEE	REPORT	ADMIN	...
------	-----	------	-------	------	--------	----------	----------	----------	--------	-------	-----

### Logo Settings

Company Logo:  No file chosen

App Logo (150 X 150):  No file chosen

#### Important Notes

Dimensions of web Logo should be 100\*25 Pixels and Mobile App logo should be 150\*150 Pixels.

Figure 104: Logo settings



Step 1: Click on choose file to choose Web logo

Step 2: Click on choose file to choose App logo

Step 3: Click on Save

**Note:** Check image dimensions on right pane and upload accordingly.

## App Configurations

User can give desired names and icons to menu items these will reflect for entire web account and mobile app. User can alter form templates names, list templates names and can set order for labels and can give images for icons as per requirement. In other words App configurations are used to alter default menu item labels, icons and ordering of labels. List of all app configurations are displayed in this screen.

**Navigation:** Admin>> Company >> Labels

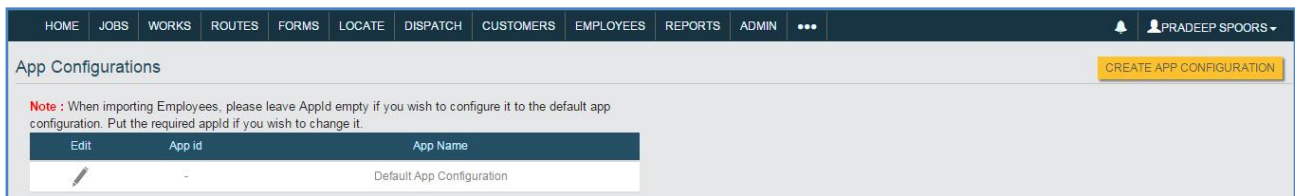


Figure 105: App Configuration list screen

User can create new app configuration or can use default app configurations. Click on create app configuration for creating new app configuration.

	Singular Label	Plural Label	Order	Visible	Upload icon
*Customer:	Customer	Customers	4	<input checked="" type="checkbox"/>	<input type="button" value="Choose file"/> No file chosen
*Employee:	Employee	Employees	20	<input checked="" type="checkbox"/>	<input type="button" value="Choose file"/> No file chosen
*Named location:	Named location	Named locations	7	<input checked="" type="checkbox"/>	<input type="button" value="Choose file"/> No file chosen
*Article:	Article	Knowledge base	6	<input checked="" type="checkbox"/>	<input type="button" value="Choose file"/> No file chosen
*Form:	Form	Forms	5	<input checked="" type="checkbox"/>	<input type="button" value="Choose file"/> No file chosen
*Job:	Job	Jobs	3	<input checked="" type="checkbox"/>	<input type="button" value="Choose file"/> No file chosen
*List:	List	Lists	8	<input checked="" type="checkbox"/>	<input type="button" value="Choose file"/> No file chosen
*Agenda:	Agenda	Agenda	1	<input checked="" type="checkbox"/>	<input type="button" value="Choose file"/> No file chosen
*Work:	Work	Works	2	<input checked="" type="checkbox"/>	<input type="button" value="Choose file"/> No file chosen

Figure 106: Create App Configuration

Step 1: Enter text under singular & plural against the field label which need to be changed.

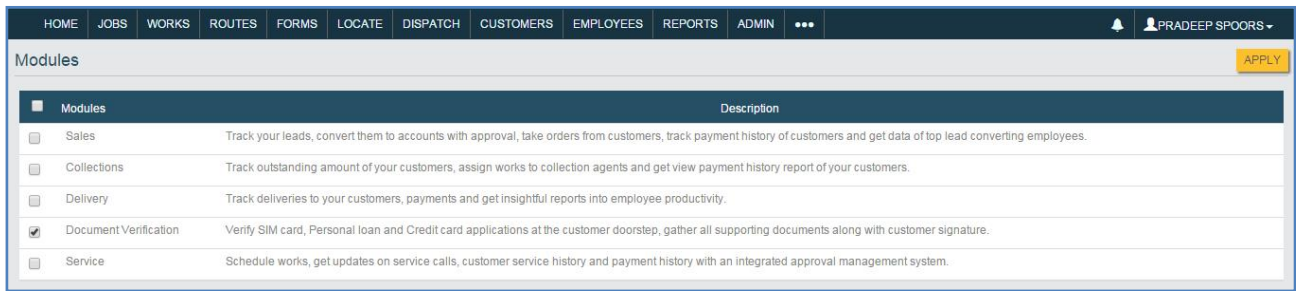
Step 2: Enter order for label, order should be in between 0 – 99.

Step 3: Click on choose file against label to change default image and to upload custom image.

Step 4: Click on save.

## Modules

**Navigation:** Admin>> Company >> Modules



Modules	Description
<input type="checkbox"/> Sales	Track your leads, convert them to accounts with approval, take orders from customers, track payment history of customers and get data of top lead converting employees.
<input type="checkbox"/> Collections	Track outstanding amount of your customers, assign works to collection agents and get view payment history report of your customers.
<input type="checkbox"/> Delivery	Track deliveries to your customers, payments and get insightful reports into employee productivity.
<input checked="" type="checkbox"/> Document Verification	Verify SIM card, Personal loan and Credit card applications at the customer doorstep, gather all supporting documents along with customer signature.
<input type="checkbox"/> Service	Schedule works, get updates on service calls, customer service history and payment history with an integrated approval management system.

**Figure 107: Modules**

**Step 1:** Select required module.

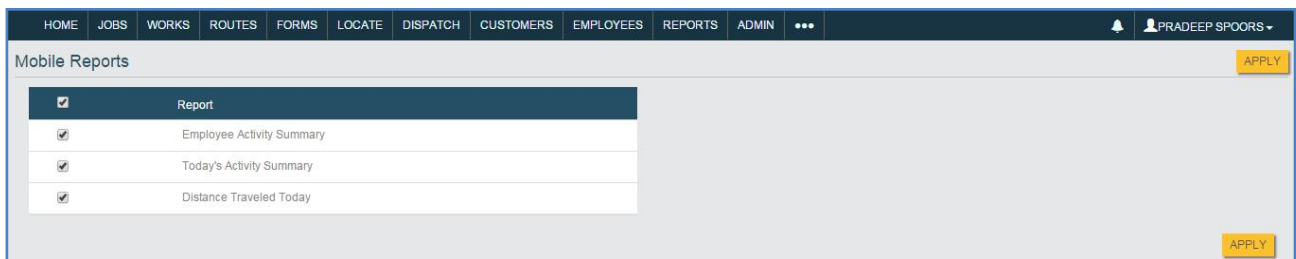
**Step 2:** Click on save.

**Step 3:** These saved modules will reflect in works.

## Mobile Reports

This is to give provision for the mobile app user to check for reports like, employee activity summary report, Today's activity report, Distance travelled report.

**Navigation:** Admin >> Company >> Mobile Reports



Report	Report
<input checked="" type="checkbox"/>	Employee Activity Summary
<input checked="" type="checkbox"/>	Today's Activity Summary
<input checked="" type="checkbox"/>	Distance Traveled Today

**Figure 108: Mobile Reports**

Select the reports which should be available for field employee to check in mobile app, these selected reports will appear in mobile app under reports.

## Settings

**Navigation:** Admin>> Company >>Settings

This is used for managing settings of company.

**Figure 109: Settings**

Select details as per the requirement and click on save.

## Work Flows

Work flow can be defined here.

## Manage Roles

Roles can be defined here. User can add or delete roles. Highest role starts with digit 1.

**Navigation:** Admin>>Workflow>>Manage roles

Rank	Role/Title	
1	CEO	
2	CTO	
3	COO	
4	Manager	
5	HR	
6	Supervisor	
7	Team Lead	

**Figure 110: Role Definitions**

**Step 1:** Click on add role to define the role.

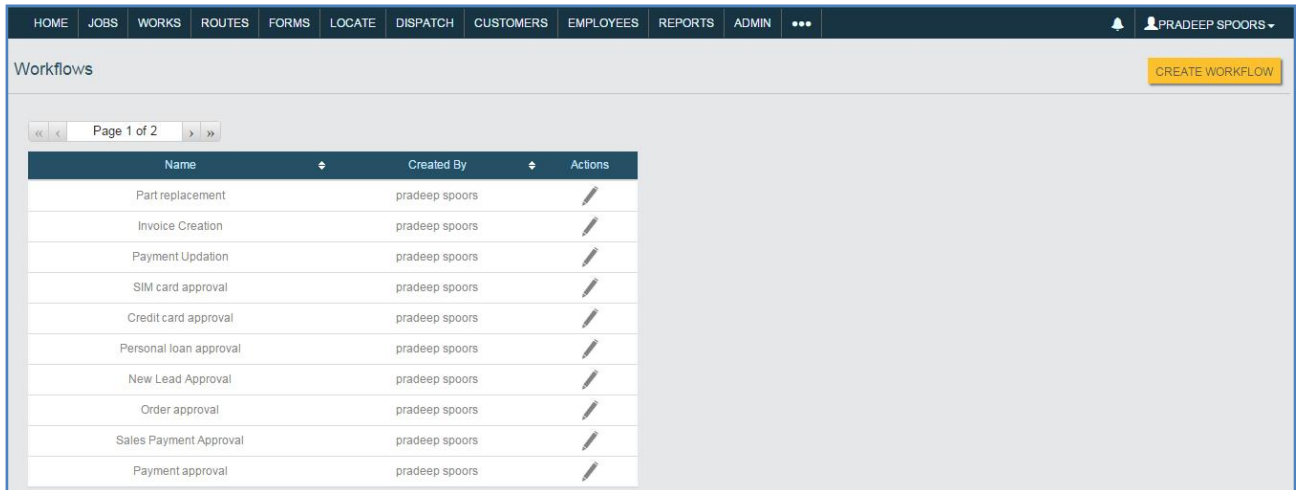
**Step 2:** Click on Save.

## Workflows

Work flow list is displayed here.

**Navigation:** Admin>>Workflow>>Workflows

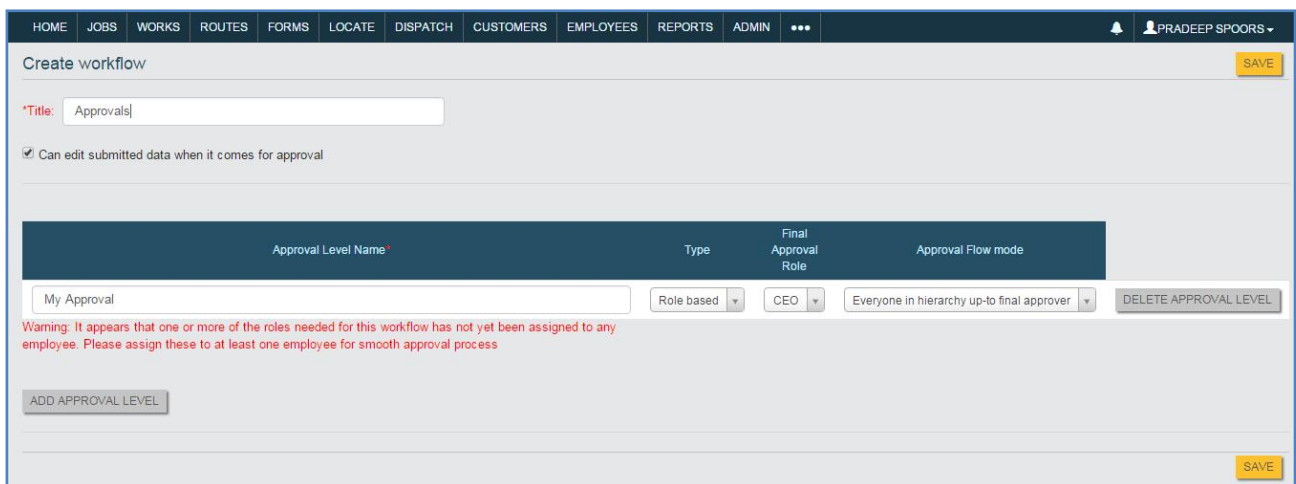
Click on **Create Work Flow**



The screenshot shows the 'Workflows' screen in a web application. At the top, there is a navigation bar with links: HOME, JOBS, WORKS, ROUTES, FORMS, LOCATE, DISPATCH, CUSTOMERS, EMPLOYEES, REPORTS, ADMIN, and a dropdown menu. A user profile 'PRADEEP SPOORS' is logged in. Below the navigation bar, the 'Workflows' section has a 'CREATE WORKFLOW' button. A table lists existing workflows, showing columns for Name, Created By, and Actions. The table contains 10 rows of workflow names, all created by 'pradeep spoors'.

Name	Created By	Actions
Part replacement	pradeep spoors	
Invoice Creation	pradeep spoors	
Payment Updation	pradeep spoors	
SIM card approval	pradeep spoors	
Credit card approval	pradeep spoors	
Personal loan approval	pradeep spoors	
New Lead Approval	pradeep spoors	
Order approval	pradeep spoors	
Sales Payment Approval	pradeep spoors	
Payment approval	pradeep spoors	

*Figure 111: List of Work Flows screen*



The screenshot shows the 'Create workflow' screen. It has a title field with 'Approvals' entered. Below the title, there is a checkbox labeled 'Can edit submitted data when it comes for approval' which is checked. A table for 'Approval Level Name' is shown with columns: Approval Level Name, Type, Final Approval Role, and Approval Flow mode. The table has one row with 'My Approval', 'Role based', 'CEO', and 'Everyone in hierarchy up-to final approver'. There are buttons for 'DELETE APPROVAL LEVEL' and 'ADD APPROVAL LEVEL'. A warning message is displayed: 'Warning: It appears that one or more of the roles needed for this workflow has not yet been assigned to any employee. Please assign these to at least one employee for smooth approval process'. There are 'SAVE' buttons at the top right and bottom right.

Approval Level Name	Type	Final Approval Role	Approval Flow mode
My Approval	Role based	CEO	Everyone in hierarchy up-to final approver

*Figure 112: Create Workflow*

**Step 1:** Enter the title.

**Step 2:** Enter the Approval level name.

## Types

There are 3 types 1) Role based

2) Employee Group Based

3) Hierarchy Based

## Role based

### Approval Flow Mode

- 1) Everyone in hierarchy up to final approver.
- 2) Direct to final Approver.
- 3) Direct After Immediate Manager.

### Everyone in Hierarchy up to final approver

Everyone in hierarchy has to approve in this.

### Direct to final Approver

Only the final Approver has to approve

### Direct After Immediate manager

Only the reporting manager and the immediate manager have to approve.

## Employee Group Based

Any one of them in the Employee group has to accept.

## Hierarchy Based

### Approval Flow Mode

- 1) Only Immediate Manager
- 2) Every One in hierarchy Up to top level

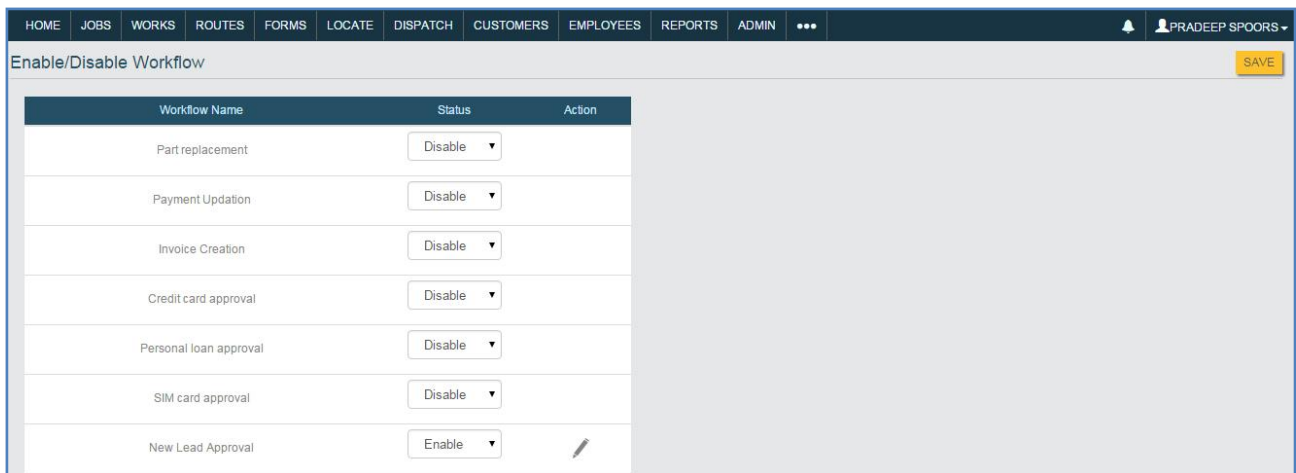
Click on save to save the work flow

**Note:** User accepts the approvals from overflow menu (3 dots) in menu bar, user can accept or reject the approval, and approval status is displayed in “forms>>Approvals” in mobile app.

## Approval settings

User can edit workflow and can alter the status of the work flow.

**Navigation:** *Admin>>Workflow>>Approval settings*

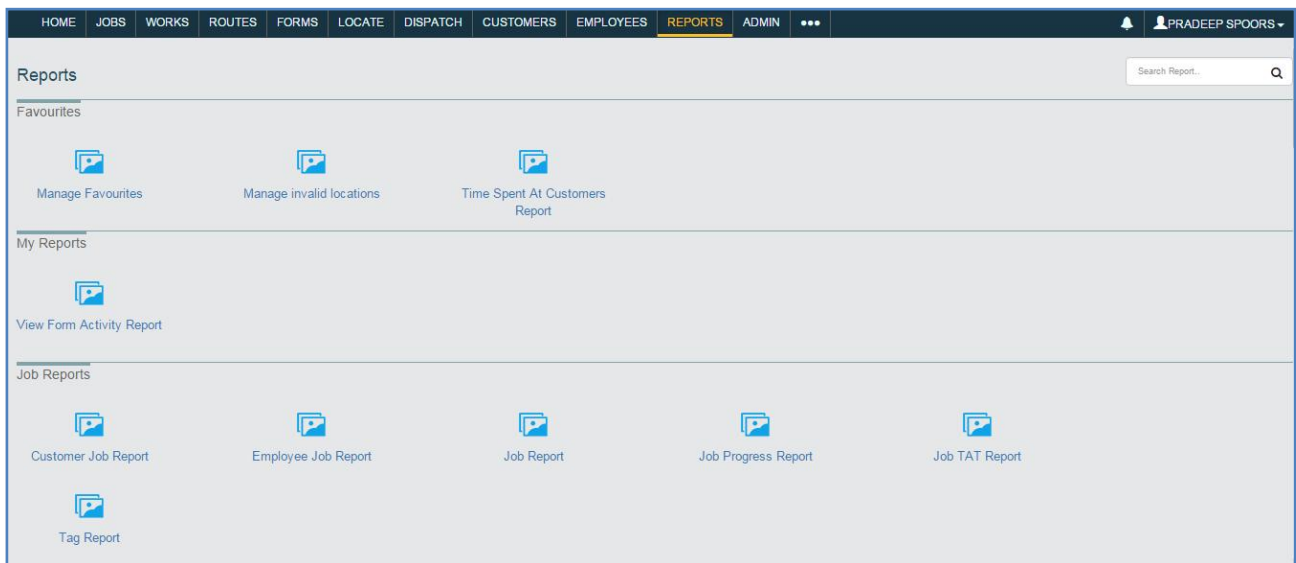


**Figure 113:Enable/Disable Workflow**

After editing click on save to save the work flow.

## Reports

Various reports that are available to user are displayed here reports like customer reports, employee reports, form reports, job reports, location reports, audits, misc reports, my reports, route plan reports etc can be checked here. User can also search for reports using search bar at top right position.



**Figure 114: Reports**

## Favourite Reports

Reports can be made favourite by clicking on the star mark. Frequently accessed reports can be made as favourite for ease of access. These favourite reports are available under quick links in home screen, configure screen and in monitor under favourite reports.

HOME JOBS WORKS ROUTES FORMS LOCATE DISPATCH CUSTOMERS EMPLOYEES **REPORTS** ADMIN ...

Work Report ★ successfully added to favourites

Work Template: Delivery

From: 2015-08-05

To: 2015-09-30

Load report as: ☐ PDF ☒ HTML ☐ XLS ☐ CSV

LOAD

Note: Data is available for only last 6 months.

Click on star mark to make report as favourite

*Figure 115: Favourite Report*

Step 1: click on star mark to make the Report as Favourite

To un favourite any report click on the same star mark

HOME JOBS WORKS ROUTES FORMS LOCATE DISPATCH CUSTOMERS EMPLOYEES **REPORTS** ADMIN ...

Work Report ★ successfully removed from favourites

Work Template: Delivery

From: 2015-08-05

To: 2015-09-30

Load report as: ☐ PDF ☒ HTML ☐ XLS ☐ CSV

LOAD

Note: Data is available for only last 6 months.

Click on star icon to unfavourite report

*Figure 116: UnFavourite*

Click on the favourite mark to unfavourite the report

## My Reports

Generates report for form activities.

### View Form Activity Report

This generates the form report activity of the form. This feature is only available to manager who is directly reporting to Root Person. Report can be generated in Xls.

**Navigation:** Reports>>My Reports>>View Form Activity Report

**Figure 117: Form Activity Report**

**Step 1:** Select form from dropdown

**Step 2:** Click on employee in left pane and click on right arrow to select employee

**Step 3:** To unselect, Click on employee in right pane and click on left arrow button

**Step 4:** Select date range

**Step 5:** Click on load

## Job Reports

Job Reports generates various types of reports like customer job report, employee job report, Job report, Job progress report, job TAT report, and tag report.

### Customer Job Report

Customer job report gives details about the list of jobs that were done to the Customer in between a selected date range. Report can be generated into 4 formats PDF, HTML, CSV, and EXCEL. Data is available for last 6 months from current date.

**Navigation:** Reports >> Job Reports >> Customer Job Report



HOME	JOBS	WORKS	ROUTES	FORMS	LOCATE	DISPATCH	CUSTOMERS	EMPLOYEES	REPORTS	ADMIN	...
------	------	-------	--------	-------	--------	----------	-----------	-----------	---------	-------	-----

### Customer Job Report ★

\*Customer :

From :

To :

Load report as : ☒ HTML ☐ PDF ☐ CSV ☐ XLS

**LOAD**

**Note :** Data is available for only last 6 months

*Figure 118: Customer Job Report*

**Step 1:** Select customer

**Step 2:** Select from and to date between which report has to be generated

**Step 3:** Select format type

**Step 4:** Click on Load

## Employee Job Report

Employee job report list out's the number of jobs assigned to an employee in a time interval. Report can be generated into 4 formats PDF, HTML, CSV and EXCEL. Data is available for last 6 months from current date.

**Navigation:** Report>>Job Reports>>Employee Job Report

HOME	JOBS	WORKS	ROUTES	FORMS	LOCATE	DISPATCH	CUSTOMERS	EMPLOYEES	REPORTS	ADMIN	...
------	------	-------	--------	-------	--------	----------	-----------	-----------	---------	-------	-----

### Employee Job Report ★

\*Employees :

From :

To :

Load report as : ☒ HTML ☐ PDF ☐ XLS ☐ CSV

**LOAD**

**Note :** Data is available for only last 6 months.

*Figure 119:Employee Job Report*

**Step 1:** Select employee

**Step 2:** Select date range in which the report has to be generated.

**Step 3:** Select format

*Step 4:* Click on load

## Job Report

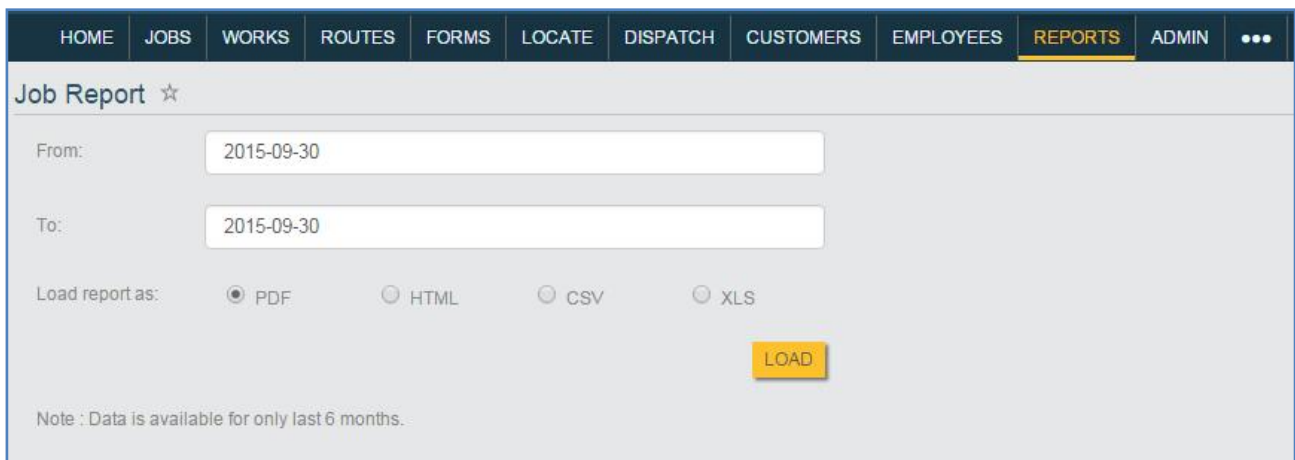
This generates all the jobs that were created and assigned to employees between selected time ranges. Report can be generated into 4 formats PDF, HTML, CSV and Xls. Data is available for last 6 months from current date.

**Navigation:** Reports>>Job Reports>> Job Report

*Step 1:* Select the form and to date range

*Step 2:* Select the format type

*Step 3:* Click on Load

The screenshot shows a web application interface for generating a Job Report. At the top is a navigation bar with tabs: HOME, JOBS, WORKS, ROUTES, FORMS, LOCATE, DISPATCH, CUSTOMERS, EMPLOYEES, REPORTS (highlighted), and ADMIN. Below the navigation bar is the 'Job Report' section, which includes a title 'Job Report' with a star icon. There are two date input fields: 'From:' and 'To:', both set to '2015-09-30'. Below these is a 'Load report as:' section with four radio button options: PDF (selected), HTML, CSV, and XLS. A yellow 'LOAD' button is positioned to the right of the format options. At the bottom of the form, a note states: 'Note : Data is available for only last 6 months.'

*Figure 120: Job Report*

## Job Progress Report

This generates the progress of the jobs that are assigned to an employee. Report can be generated into 4 formats PDF, HTML, CSV, and EXCEL. Data is available for last 6 months from current date.

**Navigation:** Reports>>Job Reports>> Job Progress Report

**Figure 121: Job Progress Report**

**Step 1:** Select employees by selecting them in left pane and click on right arrow button

**Step 2:** User can remove employees by selecting them in right pane and click on left arrow button

**Step 3:** User can search employees by using search bar in both panes

**Step 4:** Select date range

**Step 5:** Select format type in which report has to be generated in

**Step 5:** Click on Load

## Job TAT Report

This generates the time difference between the job end time and completion time. Report is generated in EXCEL format. Data is available for last 6 months from current date.

**Navigation:** Reports>>Job Reports>> Job TAT Report

**Figure 122: Job TAT Report**

**Step 1:** Select Form

**Step 2:** Click on employee in left pane and click on right arrow to select employee

**Step 3:** Select date range

**Step 4:** Click on load

## Tag Report

This is used to tag employee with customer tags, report is generated for tagged employee. Report can be generated in 2 formats HTML, EXCEL.

**Navigation:** Reports>>Job Reports>>Tag Report

**Figure 123: Tag Report**

**Step 1:** Click on employee in left pane and click on right arrow to select employee

**Step 2:** Select tag by clicking in tag field

**Step 3:** Select the date

**Step 4:** Select the format type

**Step 5:** Click on Load

## Location Reports

Location reports are used to track the employee locations and managing his locations.

### Manage Invalid Locations

Both Valid and Invalid Locations can be managed here.

**Navigation:** Reports>>Location Reports>>Manage Invalid Locations.

Search for Locations ★

\*Employees : pradeep spoors

\*Select Date : 2015-09-30

\*From Time : 00:00

\*To Time : 23:59

Location Type: ☒ All ☐ Only valid ☐ Only invalid

LOAD AS HTML

**Figure 124: Manage Invalid Locations**

**Step 1:** Select employee by entering first 3 characters of employee

**Step 2:** Select date

**Step 3:** Select date range

**Step 4:** Select Location Type

**Step 5:** Click on Load

Mark Locations as valid/invalid

All Location details for Inuyashaa chandrahaas from 2015-04-20 00:00:00 to 2015-04-20 23:59:00

UPDATE LOCATION(S)

Id	Location	Device Time	Latitude	Longitude	Invalid?
13274560		2015-04-20 08:24 PM			Yes No
13274559		2015-04-20 08:19 PM			Yes No
13274558		2015-04-20 08:14 PM			Yes No
13274557		2015-04-20 08:09 PM			Yes No
13274556		2015-04-20 08:04 PM			Yes No
13274555		2015-04-20 07:59 PM			Yes No
13274554		2015-04-20 07:54 PM			Yes No
13274553		2015-04-20 07:49 PM			Yes No
13274552		2015-04-20 07:44 PM			Yes No
13274551	2-52/1/3, Hitech City Road, Megha Hills, Sri Sai Nagar, Madhapur, Hyderabad, Telangana 500081, India	2015-04-20 07:39 PM	17.4411268	78.3912577	Yes No
13274550	1-81, Andra Basti, Guttala Begumpet, Madhapur, Hitech City Road, Kavuri Hills, Madhapur, Hyderabad, Telangana 500033, India	2015-04-20 07:34 PM	17.4411322	78.3925439	Yes No

**Figure 125: Managing Locations**

If location is invalid click on YES or else if location is valid click on NO.

## Time Spent At Customers Report

This generates the report for time spent by the Employee at customer location. Report can be generated in 4 formats HTML, CSV, Xls and PDF.

**Navigation:** Reports>>Location Reports>>Time Spent at customers report

**Figure 126: Time spent at customer Report**

**Step 1:** Select Employee by entering first 3 characters of employee name

**Step 2:** Select customer by entering first 3 characters of customer name

**Step 3:** Select date range

**Step 4:** Select Location source preferably Best Pick from the drop down

**Step 5:** Select report format type

**Step 6:** Click on Load to generate report

## Travel Overview Report

This generates the total distance travelled by an employee in a day, report is generated in Xls.

**Navigation:** Report>>Location Reports>>Travel overview report

**Figure 127: Travel Overview Report**

**Step 1:** Click on employee in left pane and click on right arrow to select employee

**Step 2:** Select customer by entering first 3 characters of employee

**Step 3:** Select tracks and check in- check out as required

**Step 4:** Select date for which report has to be generated

**Step 5:** Select location source as Best Pick preferably

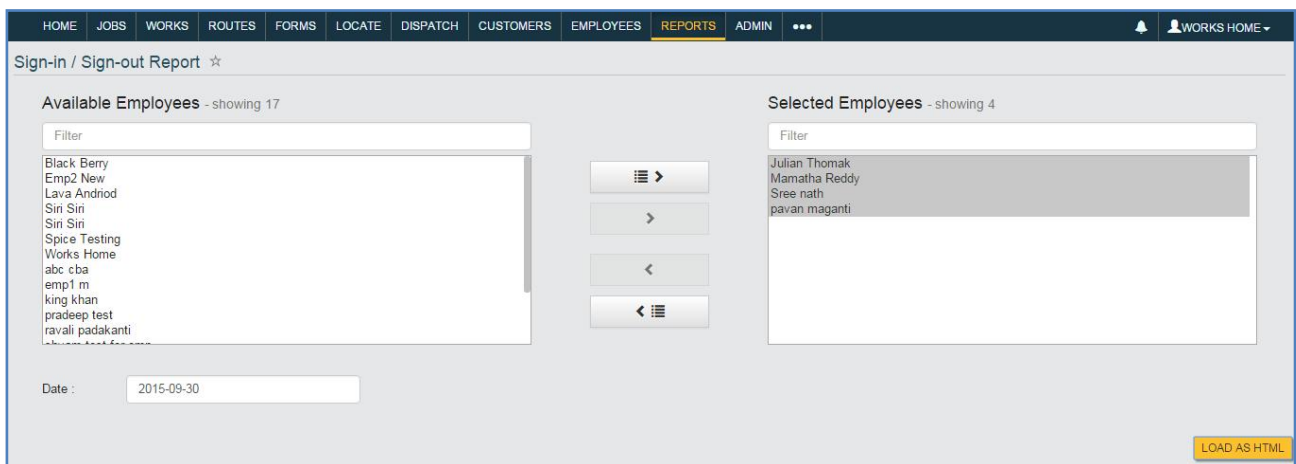
**Step 6:** Select minimum time spent at location

**Step 7:** Click on load to Generate report

## Sign In/Sign Out Report

This generates report for Sign-in/Sign-out of employee for the selected day.

**Navigation:** Reports>>Location Reports>>Sign-in /Sign-out report



**Figure 128: Sign In/Sign Out Report**

**Step 1:** Click on employee in left pane and click on right arrow to select employee

**Step 2:** To unselect, Click on employee in right pane and click on left arrow button

**Step 3:** Select the date, for which report has to be generated

**Step 4:** Click on Load

## Multi Day Sign-In/Sign-Out Report

This generates report for attendance of employee in the selected date range. Report is generated in Xls only.

**Navigation:** Report>>Location Reports>>Multiday Sign-in /Sign-out report

**Figure 129: Multiday signIn/Sign Out Report**

**Step 1:** Click on employee in left pane and click on right arrow to select employee

**Step 2:** To unselect, Click on employee in right pane and click on left arrow button

**Step 3:** Select the date range

**Step 4:** Click on Export to xls

## Track Summary Report

This generates track summary report for the employee's location, time spent at customer, distance travelled etc. Report can be generated in 4 formats HTML, PDF, CSV, and Xls.

**Navigation:** Report>>Location Reports>>Track Summary Report

**Figure 130: Track Summary Report**

**Step 1:** Select employee by entering first 3 letters of employee name.

**Step 2:** Select customer type



**Step 3:** Select date range

**Step 4:** Select time Spent

**Step 5:** Select location Source

**Step 6:** Select report format type

## Day Wise Distance Travelled Report

This generates report for day wise distance travelled by employees. Report can be generated in 4 formats HTML, PDF, Xls and CSV.

**Navigation:** Reports>>Location Reports>>Day Wise Distance Travelled Report.

The screenshot shows a web application interface for generating a 'Day Wise Distance Travelled Report'. At the top is a navigation bar with tabs: HOME, JOBS, WORKS, ROUTES, FORMS, LOCATE, DISPATCH, CUSTOMERS, EMPLOYEES, REPORTS (highlighted), and ADMIN. Below the navigation bar, the page title is 'Day Wise Distance Traveled Report'. The interface is divided into two main panes for selecting employees. The left pane has a 'Filter' box and a list of employee names: Black Berry, Emp2 New, Lava Andriod, Maksymilian Maria, Siri Siri, Siri Siri, Spice Testing, Works Home, abc cba, emp1 m, king khan, pradeep test, and an option to 'select all'. The right pane also has a 'Filter' box and a list of employee names: Julian Thomak, Kanakachary Endrakanti, Mamatha Reddy, Sree nath, and pavan maganti. Between the panes are four buttons: a list icon with a right arrow, a right arrow, a left arrow, and a list icon with a left arrow. Below the panes, there are date range selectors: 'From : 2015-09-07 00:00' and 'To : 2015-09-30 23:59'. There are also radio buttons for 'Location Source' (Best Pick, Gps only, Cell only) and 'Load report as' (HTML, PDF, XLS). A 'LOAD' button is in the bottom right corner.

**Figure 131: Day wise distance travelled Report**

**Step 1:** Click on employee in left pane and click on right arrow to select employee

**Step 2:** To unselect, Click on employee in right pane and click on left arrow button

**Step 3:** Select date range

**Step 4:** Select location Source

**Step 5:** Select report Format type

**Step 6:** Click on Load

## Employee Wise Distance Travelled Report

This generates report for distance travelled by individual employees. Report is generated in Xls.

**Navigation:** Reports>>Location Reports>>Employee Wise Distance Travelled Report.

**Figure 132: Employee Wise distance travelled report**

**Step 1:** Click on employee in left pane and click on right arrow to select employee

**Step 2:** To unselect, Click on employee in right pane and click on left arrow button

**Step 3:** Select date range

**Step 4:** Select location source as best pick

**Step 5:** Click on load to generate report

## Detail Tracking Report

This generates the report of employee's tracking details like location with latitude and longitude, battery level, how he is connected to internet, etc. Report is generated for only the selected date. Report can be generated in 2 formats HTML and Xls.

**Navigation:** Report>>Location Reports>>Detail Tracking Report.

**Figure 133: Detail Tracking Report**

**Step 1:** Select employee by entering first 3 characters of employee

Step 2: Select date

Step 3: Select location source as best pick

Step 4: Select load type

Step 5: Click on load to generate report

### Last Known Locations Report

This generates the last known locations report for all employees. Report can be generated in HTML, CSV, PDF, and Xls.

**Navigation:** Report>>Location Reports>>Last Known locations Report.

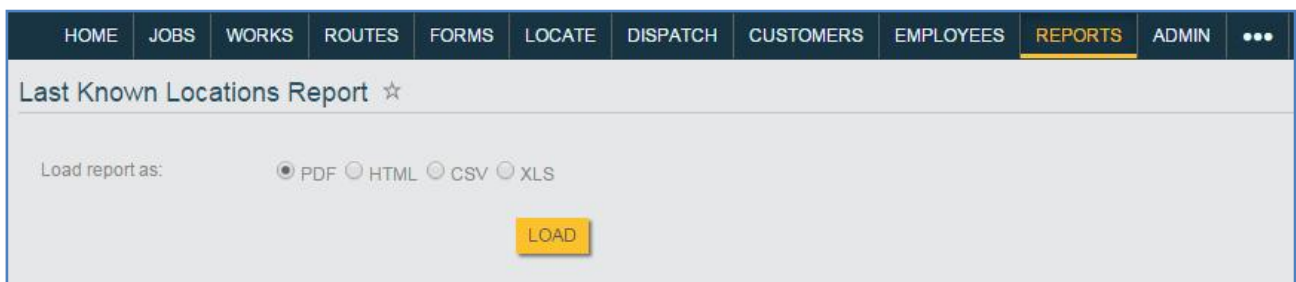


Figure 134: Last Known Locations Report

Step 1: Select the load report Format type

Step 2: Click on load

### Customer Check in - Checkout Report

This generates the customers check in check out report. Employee on reaching to customer and when about to start the customer work will click on check in the mobile app under customers, after completion of that work he will click on check out, by this user can know how much time employee spend in customer location and how much time employee took to complete the job. Report can be generated in 3 formats HTML, PDF, Xls.

**Navigation:** Reports>>Location Reports>>Customer check in - Checkout Report.

**Figure 135: Customer Check in check out report**

**Step 1:** Click on employee in left pane and click on right arrow to select employee

**Step 2:** To unselect, Click on employee in right pane and click on left arrow button

**Step 3:** Select date range

**Step 4:** Select Load Report format

**Step 5:** Click on load to generate report

## Employee Attendance Report

Employee Attendance details are generated punch- In Punch out time etc.

**Navigation:** Reports>>Location Reports>>Employee Attendance Report.

**Figure 136: Employee Attendance Report**

*Step 1:* Click on employee in left pane and click on right arrow to select employee

*Step 2:* To unselect, Click on employee in right pane and click on left arrow button

*Step 3:* Select required field at “At”

*Step 4:* Select date range

*Step 5:* Select location source preferably best pick

*Step 6:* Select load type

*Step 7:* Click on Load to generate report

## Customer Reports

Reports related to customer activities are described here.

### Locked customer reports

This is to check for the locked customers. Employees can lock customers those locked customers can be seen here under in locked customers. Report of Locked customers report can be generated in 2 formats HTML and Excel.

**Navigation:** *Reports>>Customer Reports>>Locked Customers Report*

HOME JOBS WORKS ROUTES FORMS LOCATE DISPATCH CUSTOMERS EMPLOYEES **REPORTS** ADMIN ...

Locked Customer Report ☆

**Available Employees** - showing 0

Filter

**Selected Employees** - showing 4

Filter

Back office 1234  
Kumar varma  
pradeep spoors  
ravi chand

Load report as: ☒ HTML ☐ XLS

LOAD

**Figure 137: Locked customer Report**

*Step 1:* Select the employee by clicking on employee and click on right arrow button.

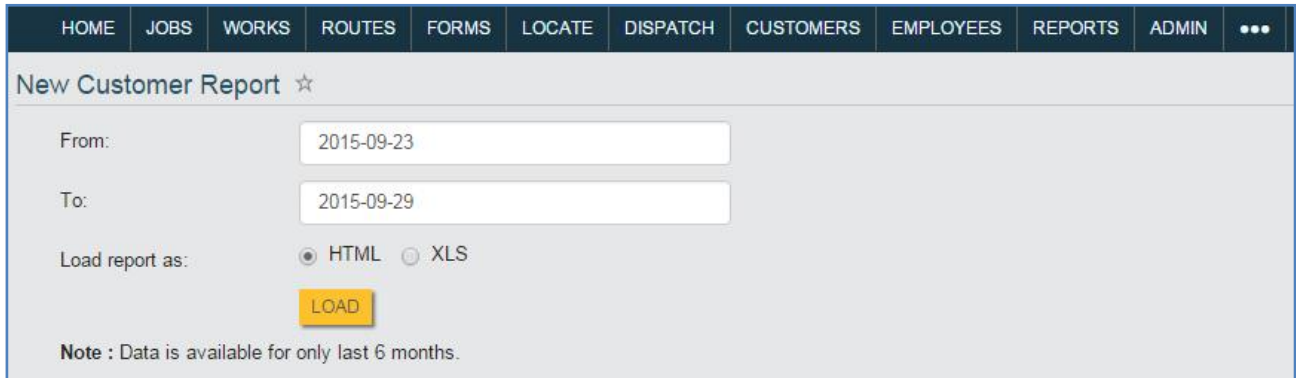
*Step 2:* Select the format which in report has to be generate the report

Step 3: Click on Load

## New Customer Report

Report for New Customers is generated here. Report can be generated in 2 formats HTML and Xls.

**Navigation:** Reports>>Customers Report>>New Customer Report



The screenshot shows the 'New Customer Report' form. At the top is a navigation bar with tabs: HOME, JOBS, WORKS, ROUTES, FORMS, LOCATE, DISPATCH, CUSTOMERS, EMPLOYEES, REPORTS, ADMIN, and a menu icon. The 'REPORTS' tab is active. Below the navigation bar, the form title 'New Customer Report' is followed by a star icon. The form contains two date input fields: 'From:' with the value '2015-09-23' and 'To:' with the value '2015-09-29'. Below these is a 'Load report as:' section with radio buttons for 'HTML' (selected) and 'XLS'. A yellow 'LOAD' button is positioned below the radio buttons. At the bottom, a note states: 'Note : Data is available for only last 6 months.'

Figure 138: New Customer Report

Step 1: Select the Date Range

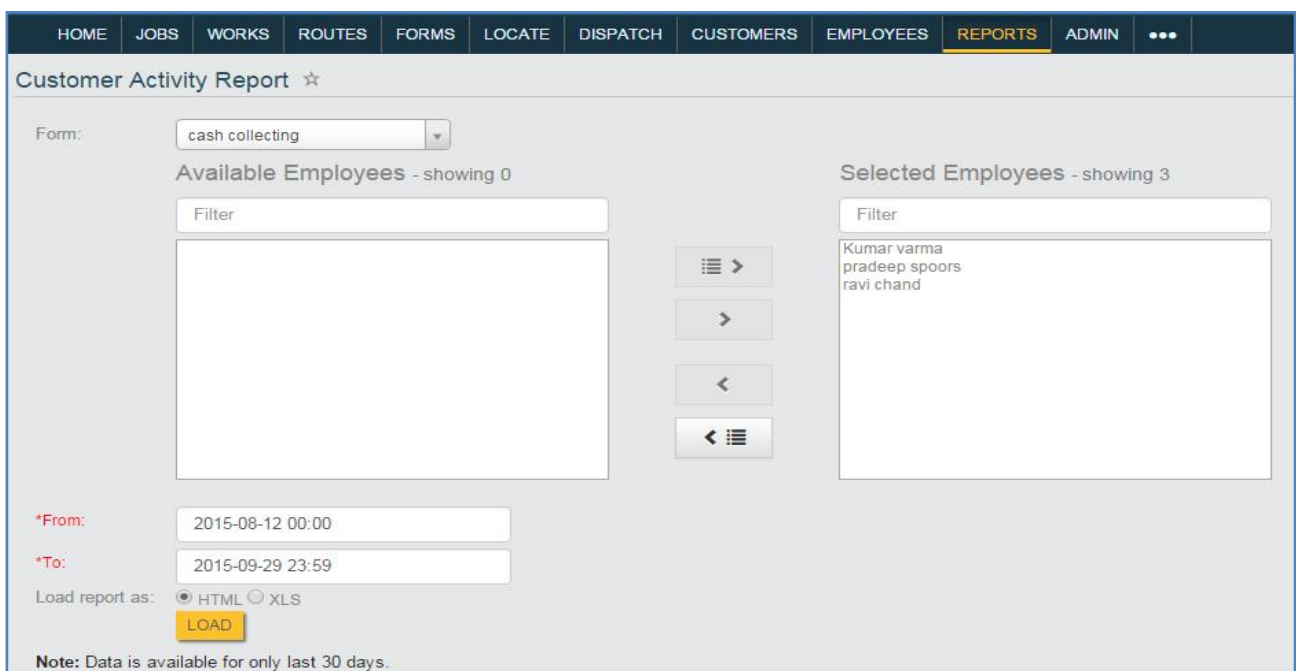
Step 2: Select the Report Type to be generated in

Step 3: Click on Load

## Customer Activity Report

This generates the report for number of activities done for customer by employees. Report can be generated in 2 formats HTML and Xls.

**Navigation:** Reports>>Customer Reports>> Customer Activity Report.



The screenshot shows the 'Customer Activity Report' form. The navigation bar is similar to the previous form, but the 'REPORTS' tab is highlighted. The form title 'Customer Activity Report' is followed by a star icon. At the top left, there is a 'Form:' dropdown menu with 'cash collecting' selected. Below this, there are two panels: 'Available Employees - showing 0' and 'Selected Employees - showing 3'. The 'Available Employees' panel has a 'Filter' input field and an empty list area. The 'Selected Employees' panel also has a 'Filter' input field and a list containing three names: 'Kumar varma', 'pradeep spoors', and 'ravi chand'. Between these panels are four buttons: a list icon with a right arrow, a right arrow, a left arrow, and a list icon with a left arrow. At the bottom, there are two date input fields: '\*From:' with the value '2015-08-12 00:00' and '\*To:' with the value '2015-09-29 23:59'. Below these is a 'Load report as:' section with radio buttons for 'HTML' (selected) and 'XLS'. A yellow 'LOAD' button is positioned below the radio buttons. At the bottom, a note states: 'Note: Data is available for only last 30 days.'

Figure 139: Customer Activity Report

*Step 1:* Select the Form.

*Step 2:* Select the date range.

*Step 3:* Select the format in which report has to be generated.

*Step 4:* Click on Load.

## Customer Status Report

This generates report for status of customer whether the customer is active or Inactive. Report can be generated in 4 types HTML, CSV, PDF and Xls.

**Navigation:** *Reports>>Customer reports>> Customer Status Report.*

The screenshot shows a web application interface with a top navigation bar containing links: HOME, JOBS, WORKS, ROUTES, FORMS, LOCATE, DISPATCH, CUSTOMERS, EMPLOYEES, REPORTS (highlighted), and ADMIN. Below the navigation bar is a header for the 'Active/Inactive Customer Report' with a star icon. The main form area contains three input fields: 'State' with a dropdown menu set to 'All', 'Period' with a dropdown menu set to '01' and a label '(In months)', and 'Load report as:' with four radio button options: HTML (selected), XLS, PDF, and CSV. A yellow 'LOAD' button is positioned below the radio buttons.

*Figure 140: Customer Status Report*

*Step 1:* Select state, whether Active or Inactive customers

*Step 2:* Select period.

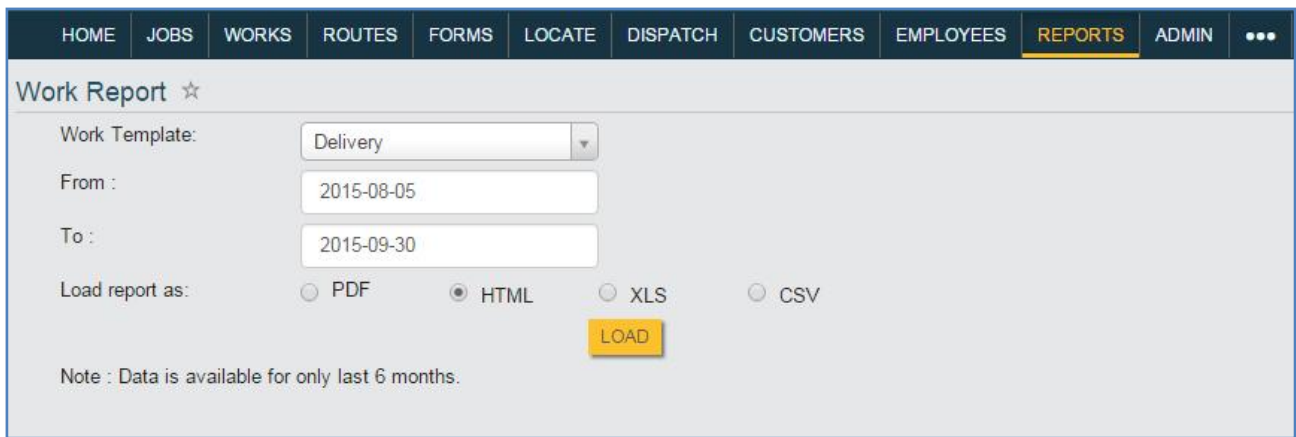
*Step 3:* Select report type in which it has to be generated in.

*Step 4:* Click on load to generate report.

## Work Report

It displays the work fields' data of the selected template in the selected date range. Report can be generated in 4 formats PDF, CSV, EXCEL and HTML.

**Navigation:** *Reports>>Works>>Work Report*



**Figure 141: Work report**

**Step 1:** Select work template from dropdown

**Step 2:** Select date range

**Step 3:** Select report type in which report has to be generated

**Step 4:** Click on load

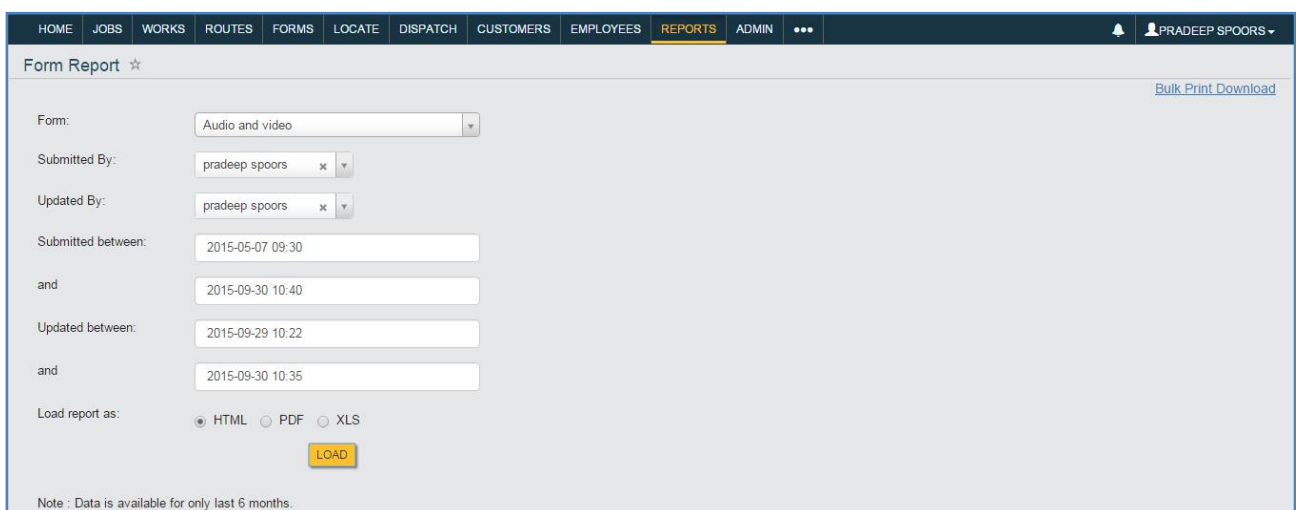
## Form Reports

Form reports are used to generate various form reports like Form report, Saved search report.

### Form Report

Form report loads the field values of the selected form. The report can be generated in 3 formats like PDF, EXCEL, and HTML.

**Navigation:** Reports>>Form Reports>> Form Report



**Figure 142: Form Report**

**Step 1:** Select form template

**Step 2:** Fill details

**Step 3:** Select format type in which report to be generated in



Step 4: Click on load

## Bulk Print Download

**Navigation:** Reports>>Form Reports >>Form Report

This is used to download form field values in bulk. Admin will send a mail to user's registered mail.

A dialog box titled "Form Bulk Download" with a close button (X) in the top right corner. It contains a "Form:" dropdown menu with "--SELECT FORM TEMPL..." as the selected option. Below it is a "Date:" text input field containing "2015-09-30". Further down is a "Load report as:" section with two radio buttons: "PDF" (which is selected) and "DOC". At the bottom is a large orange button labeled "REQUEST FOR FORM BULK DOWNLOAD".

Figure 143: Bulk Print Download

Step 1: Select form template

Step 2: Select date

Step 3: Select format type

Step 4: Click on "Request for form bulk download"

## Route Plan Report

**Navigation:** Reports>>Route Plan Report

This generates the progress of Route Plan Report for selected Employees. Report can be generated in 4 formats HTML, CSV, PDF, and Xls.

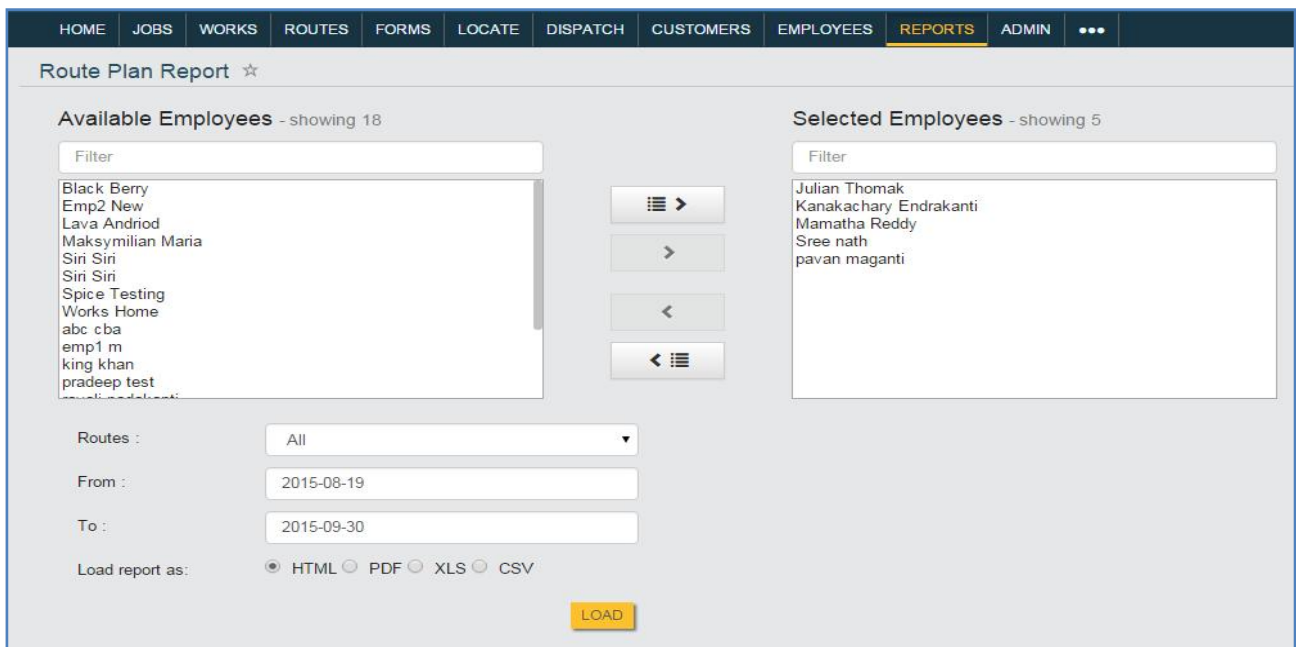
The "Route Plan Report" interface features a top navigation bar with tabs: HOME, JOBS, WORKS, ROUTES, FORMS, LOCATE, DISPATCH, CUSTOMERS, EMPLOYEES, REPORTS (highlighted), and ADMIN. The main content area is divided into two columns. The left column, titled "Available Employees - showing 18", includes a "Filter" input field and a list of employee names: Black Berry, Emp2 New, Lava Andriod, Maksymilian Maria, Siri Siri, Siri Siri, Spice Testing, Works Home, abc cba, emp1 m, king khan, pradeep test, and an option to "select all". The right column, titled "Selected Employees - showing 5", also has a "Filter" input field and a list of names: Julian Thomak, Kanakachary Endrakanti, Mamatha Reddy, Sree nath, and pavan maganti. Between these columns are four buttons: a list icon with a right arrow, a right arrow, a left arrow, and a list icon with a left arrow. Below the employee lists are filters for "Routes:" (set to "All"), "From:" (2015-08-19), and "To:" (2015-09-30). At the bottom, the "Load report as:" section has radio buttons for HTML (selected), PDF, XLS, and CSV. A large orange "LOAD" button is positioned at the bottom center.

Figure 144: Route Plan Report

Step 1: Click on employee in left pane and click on right arrow to select employee

Step 2: To unselect, Click on employee in right pane and click on left arrow button

Step 3: Select Routes from dropdown

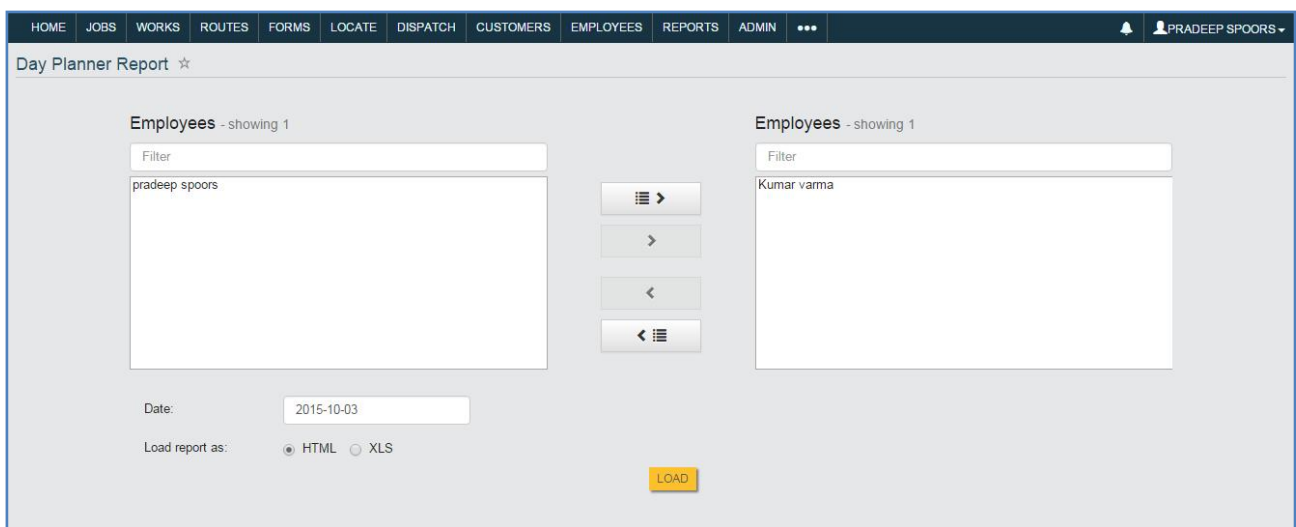
Step 4: Select date Range

Step 5: Select Load report format type

## Day Plan Report

**Navigation:** Reports>> Day Plan Report

This generates report for day plan created by employee for specific date. Report can be generated in HTML or XLS.



**Figure 145: Day Plan Report**

Step 1: Select Employee By clicking on employee and click on right arrow button.

Step 2: Enter date and select report format

Step 3: Click on load to pull report data.

## Employee Reports

This Generates the Reports of Employee Activities.

### Leave Quota Report

This generates the leave details of employees. Report can be generated in 4 formats HTML, CSV, PDF and Xls.

**Navigation:** Reports>>Employee Reports>>Leave Quota Report

*Figure 146: Leave Quota Report*

**Step 1:** Select the load report format type

**Step 2:** Click on Load

## Employee Leave Report

This generates the leave report of an employee in selected date range. Report can be generated in 4 formats CSV, HTML, PDF, and Xls.

**Navigation:** Reports>>Employee Reports>> Employee Leave report.

*Figure 147: Employee Leave Report*

**Step 1:** Select Employee.

**Step 2:** Select Date Range.

**Step 3:** Select the load report Format.

**Step 4:** Click on Load.

## Employee Activity Report

This generates the Hour wise Employee Activity report. It generates the individual employee activity report in a given time field. Report is generated in Xls.

**Navigation:** Reports>>Employee Reports>> Employee Activity Report

*Figure 148:Route And Activity Report*

**Step 1:** Select employee

**Step 2:** Select date range

**Step 3:** Select Location source preferably best pick

**Step 4:** Click on Load to generate report

## Employee Activity Summary Report

This generates the Activities done by the Employees. Activities like forms, works, routes etc.

Report can be generated in 2 formats HTML, Xls.

**Navigation:** Reports>>Employee Reports>> Employee Activity Summary.

*Figure 149: Employee Activity summary report*

## Web User Login Report

**Navigation:** Reports>>Employee Reports>>Web user login Report

HOME

JOBS

WORKS

ROUTES

FORMS

LOCATE

DISPATCH

CUSTOMERS

EMPLOYEES

REPORTS

ADMIN

...

Web User Login Report

EXPORT TO XLS

Emp.No.	Employee	Last Login Time
124	Inuyashaa chandrahaas	
123	James Cristopher	
1489	Penni James	
2015070316015400001	Ravi Kanth	

EXPORT TO XLS

Figure 150: Web User Login Report

## Device Event logs

This gives details about the mobile device such as number of calls made/received, messages sent/received, GPS status On/Off, Network status On/Off, mode of internet using etc. user can filters device events logs by applying filters from left pane, filters include event types, from and to date, Employee name. Enter filter values and click on apply for applying filters, click on reset to clear all filters.

**Navigation:** Reports>>Employee Reports>>Device Event logs

HOME

JOBS

WORKS

ROUTES

FORMS

LOCATE

DISPATCH

CUSTOMERS

EMPLOYEES

REPORTS

ADMIN

...

Figure 151: Device Event logs

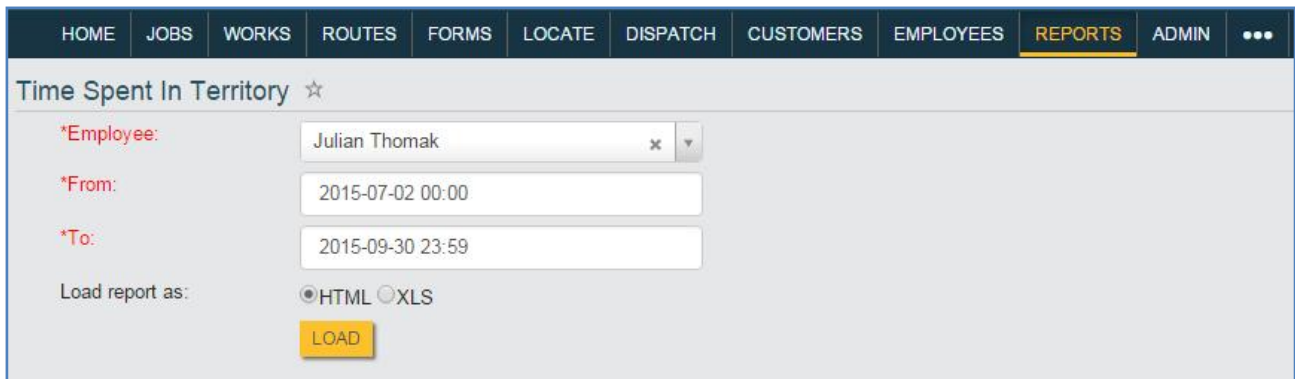
## Territory

Territory is as an area selected by the user.

### Time Spent In Territory

It generates the report for the duration of employee in the Assigned Territory Report can be generated into 4 formats HTML, CSV, PDF, and Xls. First a territory has to be created and should be assigned to employee's refer territory mapping under employee's section.

**Navigation:** Reports>>Territory>>Time Spent In Territory.



The screenshot shows a web application interface with a top navigation bar containing links: HOME, JOBS, WORKS, ROUTES, FORMS, LOCATE, DISPATCH, CUSTOMERS, EMPLOYEES, REPORTS (highlighted), ADMIN, and a menu icon. Below the navigation bar, the page title is 'Time Spent In Territory' with a star icon. The form contains the following fields: '\*Employee:' with a dropdown menu showing 'Julian Thomak'; '\*From:' with a date input '2015-07-02 00:00'; '\*To:' with a date input '2015-09-30 23:59'; and 'Load report as:' with radio buttons for 'HTML' (selected) and 'XLS'. A yellow 'LOAD' button is positioned below the radio buttons.

*Figure 152: Time spent in Territory report*

**Step 1:** Select employee by entering first 3 characters of employee name.

**Step 2:** Select date Range

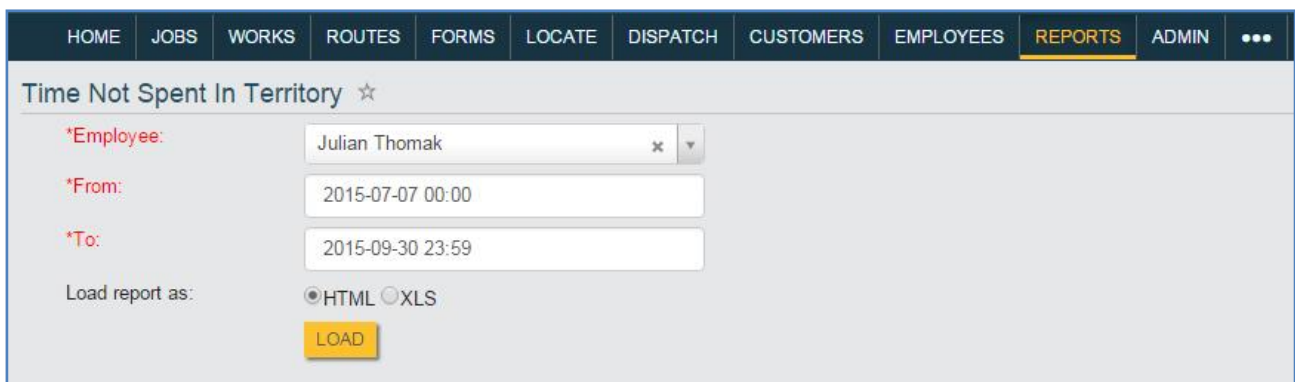
**Step 3:** Select report load type

**Step 4:** Click on load, Report will be generated

### Time Not spent in Territory

It generates the Report for the duration of employee not spent in the Assigned Territory. Report can be generated in 4 formats HTML, CSV, PDF, and Xls.

**Navigation:** Reports>>Territory>>Time Not Spent In Territory.



The screenshot shows a web application interface with a top navigation bar containing links: HOME, JOBS, WORKS, ROUTES, FORMS, LOCATE, DISPATCH, CUSTOMERS, EMPLOYEES, REPORTS (highlighted), ADMIN, and a menu icon. Below the navigation bar, the page title is 'Time Not Spent In Territory' with a star icon. The form contains the following fields: '\*Employee:' with a dropdown menu showing 'Julian Thomak'; '\*From:' with a date input '2015-07-07 00:00'; '\*To:' with a date input '2015-09-30 23:59'; and 'Load report as:' with radio buttons for 'HTML' (selected) and 'XLS'. A yellow 'LOAD' button is positioned below the radio buttons.

*Figure 153: Time not spent in territory*

**Step 1:** Select employee by entering first 3 characters of employee name.

**Step 2:** Select date range

**Step 3:** Select report type in which report has to be generated

Step 4: Click on load to generate report

## Claims

User submits claims on behalf of the employees he can accept the claim or reject the claim.

### Submit

**Navigation:** Menu-bar>>3 dots>>Claims>>

Click on submit claims

User can submit claims on behalf of employees

Figure 154: Submit

Step 1: Select employee from dropdown

Step 2: Select from & to date

Step 3: Click on view

Distance travelled by employee for each date is displayed, select mode of transport, user can also delete submission by clicking on delete icon under actions. Mode of transport (Bike, car, etc) is added under Admin>>Claims>>settings.

## Approve

**Navigation:** Reports>>Claims >>Approve

User can approve or reject submitted claims

Date	Actual Distance	Claimed Distance	Mode of Transport	Total Amount	Approve	Reject	Comments
2015-09-01	0.0	5.0	sreenath	100.0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
2015-09-02	0.0	25.0	sreenath	500.0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
2015-09-03	0.0	10.0	sreenath	200.0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

Figure 155: Approve Claims

**Step 1:** Select employee

**Step 2:** Select date range

**Step 3:** Click on view

List of claims that needs actions appears, user can approve or reject by selecting on appropriate check box, and user can also enter comments for the approval and click on save to reflect changes.

## Schedule Reports

These Reports are sent to registered mail on the basis of Daily, Weekly and Monthly. Report can be of PDF or Excel Format.

**Navigation:** Reports>>Schedule Reports>> Schedule Report

Title	Daily	Weekly	Monthly	Report type
Track Summary report	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PDF
Distance Traveled report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PDF
Employee Job report	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	PDF
Time Spent At Given Location Report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PDF
Employee Attendance At Customer	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	PDF
Employee Attendance At Location	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	PDF
Sign-In/Sign-Out Report	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	XLS
Employee Day Distance Wise Report	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	XLS

Figure 156: schedule Reports

**Step 1:** Select The Check box as of user requirement

**Step 2:** Select the Report Format type

**Step 3:** Click on Save

## Audits

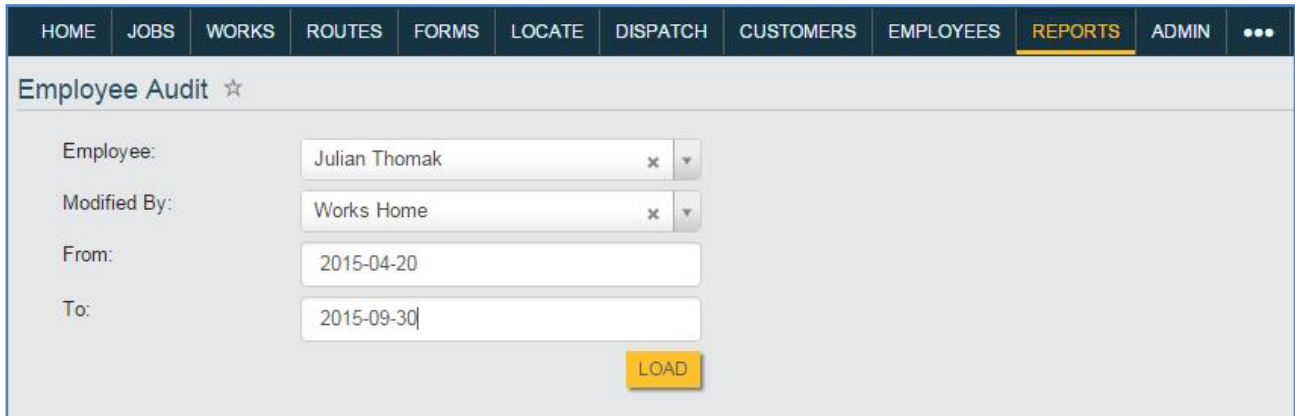
Changes/modifications that are done on employee, customers, jobs, job invitations, forms, form templates and lists etc can be checked here.



## Employee Audit

This generates report for changes/modifications done on the employee. Report can be loaded in HTML.

**Navigation:** Reports>>Audits>>Employee Audits



*Figure 157: Employee Audit*

*Step 1:* Select employee by entering first 3 characters of employee

*Step 2:* Select modified by (Employee) by entering first 3 characters of employee

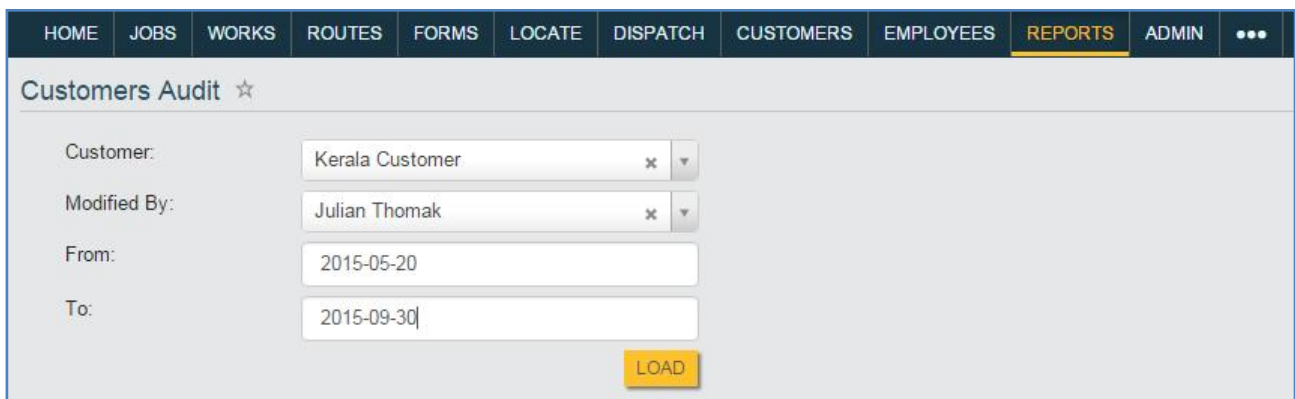
*Step 3:* Select date Range

*Step 4:* Click on load

## Customer Audit

This generates report for changes/modifications done on customers, report can be loaded in HTML.

**Navigation:** Reports>>Audits>>Customer Audits.



*Figure 158: Customer Audit*

*Step 1:* Select Customer by entering first 3 characters of customer name

*Step 2:* Select modified by (Employee), by entering first 3 characters of customer name

*Step 3:* Select date range

*Step 4:* Click on Load

## Job Audits

This generates report for changes/modifications that are done on jobs. Report can be loaded in HTML.

**Navigation:** Reports>> Audits>>Job Audits

Job Audit ☆

Employee: Julian Thomak x ▾

Modified By: Sree nath x ▾

From: 2015-06-02

To: 2015-09-30

LOAD

*Figure 159: Job Audits*

**Step 1:** Select employee by entering first 3 characters of employee name

**Step 2:** Select modified by (Employee), by entering first 3 characters of employee name

**Step 3:** Select date range

**Step 4:** Click on load

## Job Invitation Audit

This generates report for changes/modifications done on job invitations. Report can be loaded in HTML.

**Navigation:** Reports>>Audits>>Job Invitation Audits

Job Invitation Audit ☆

Employee: Julian Thomak x ▾

Modified By: Sree nath x ▾

From: 2015-05-02

To: 2015-09-30

LOAD

*Figure 160: Job Invitation Audit*

**Step 1:** Select employee by entering first 3 characters of employee name

**Step 2:** Select modified by (Employee), by entering first 3 characters of employee name

**Step 3:** Select date Range

Step 4: Click on load

## Form Audit

This generates report for changes/modifications done on forms. Report can loaded in HTML.

**Navigation:** Reports>>Audits>>Form Audits

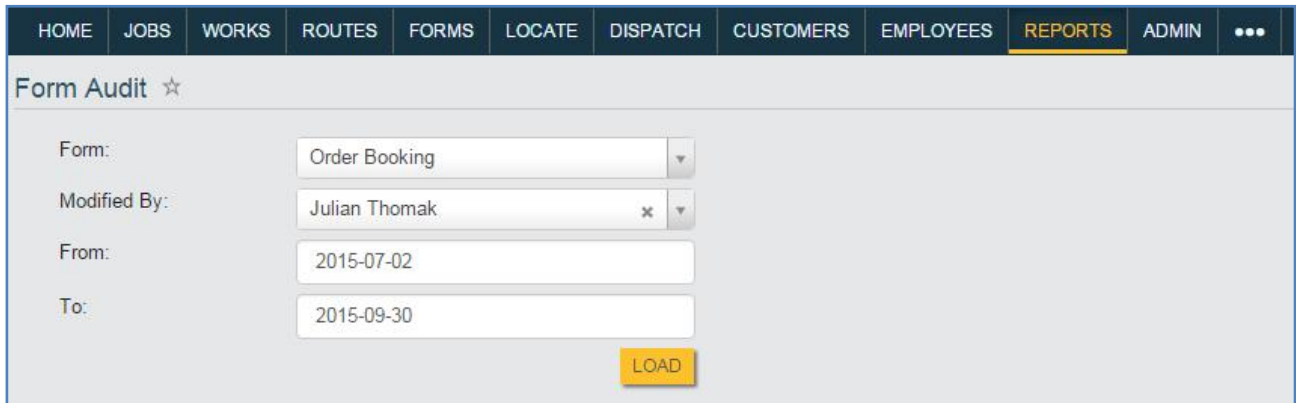
The screenshot shows the 'Form Audit' interface within a web application. At the top is a navigation bar with tabs: HOME, JOBS, WORKS, ROUTES, FORMS, LOCATE, DISPATCH, CUSTOMERS, EMPLOYEES, REPORTS (highlighted), and ADMIN. Below the navigation bar is the 'Form Audit' header with a star icon. The main form contains four input fields: 'Form:' with a dropdown menu showing 'Order Booking', 'Modified By:' with a dropdown menu showing 'Julian Thomak' and a search icon, 'From:' with a text input showing '2015-07-02', and 'To:' with a text input showing '2015-09-30'. A yellow 'LOAD' button is positioned at the bottom right of the form.

Figure 161: Form Audit

Step 1: Select Form from dropdown

Step 2: Select modified by (Employee), by entering first 3 characters of employee name

Step 3: Select date Range

Step 4: Click on load

## Form Template Audit

This generates report for changes/modifications done on form templates. Report can be loaded in HTML.

**Navigation:** Reports>>Audits>>Form Template Audit

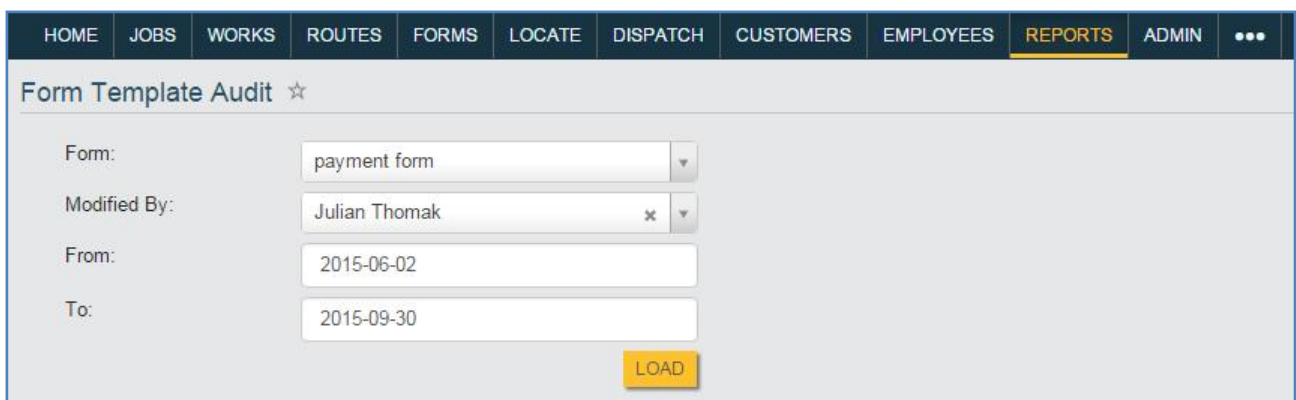
The screenshot shows the 'Form Template Audit' interface within a web application. At the top is a navigation bar with tabs: HOME, JOBS, WORKS, ROUTES, FORMS, LOCATE, DISPATCH, CUSTOMERS, EMPLOYEES, REPORTS (highlighted), and ADMIN. Below the navigation bar is the 'Form Template Audit' header with a star icon. The main form contains four input fields: 'Form:' with a dropdown menu showing 'payment form', 'Modified By:' with a dropdown menu showing 'Julian Thomak' and a search icon, 'From:' with a text input showing '2015-06-02', and 'To:' with a text input showing '2015-09-30'. A yellow 'LOAD' button is positioned at the bottom right of the form.

Figure 162: Form Template Audit

Step 1: Select Form from dropdown

Step 2: Select Modified by (Employee), by entering first 3 characters of employee name

Step 3: Select Date Range

Step 4: Click on Load

## List Audit

This generates report for changes/modifications done on lists. Report can be loaded in HTML.

**Navigation:** Reports>>Audits>>List Audit.

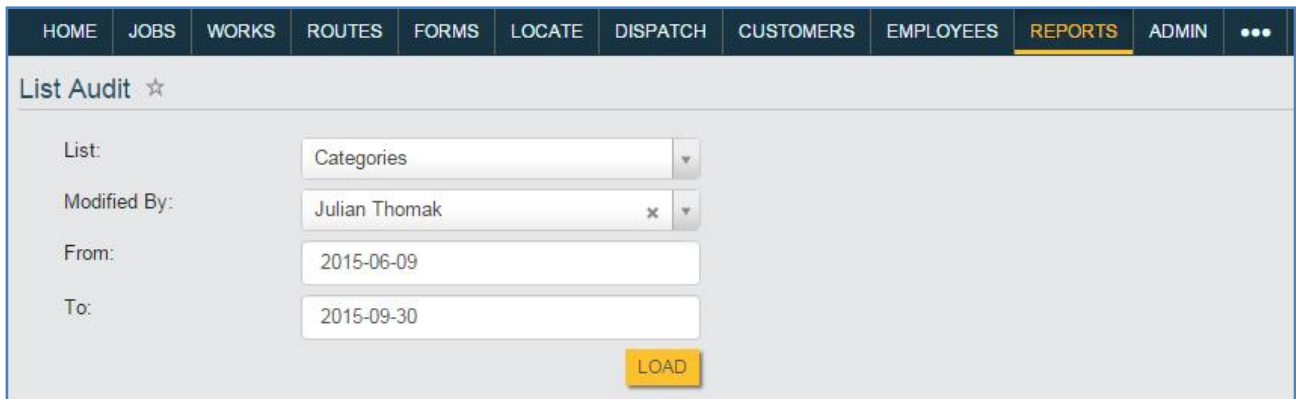


Figure 163: list Audit

Step 1: Select list from dropdown

Step 2: Select modified by (employee), by entering first 3 characters of employee name

Step 3: Select date range

Step 4: Click on load

## Calendars

This module gives flexibility to define user specific calendars.

### Create Calendar

This is used to create user defined calendar and to set the working hours of each day etc.

This calendar can be selected while creating employee, if user want to use this created calendar then select this calendar in place of “Default Calendar” while creating employee.

**Navigation:** Admin>>Calendars>>Create Calendar

**Figure 164: Create Calendar**

**Step 1:** Enter Title

**Step 2:** Enter description

**Step 3:** Click on Add, to set Title, Start Time and End Time



**Step 4:** Click on delete to delete timings for the day

**Step 5:** When finished click on Save

## Calendar

This is used to set Special days and to alter the behaviour of default calendar.

**Navigation:** Admin>>Calendars>>Calendar

ID	Title	Description	Actions
992	Default Calendar		 

**Figure 165: Calendar**

**Step 1:** Click add new calendar to add new calendar

**Step 2:** Click on Manage working hour's button (watch mark) to alter the behaviour of default calendar

**Step 3:** Click on Manage holiday and special day's button (chair mark) to set any special days or holidays

## My Calendar

The purpose of this is to view the calendar details, like its working hours and holidays and special days.

**Navigation:** Admin>>Calendars>>My Calendar

The screenshot shows a web application interface with a top navigation bar containing links: HOME, JOBS, WORKS, ROUTES, FORMS, LOCATE, DISPATCH, CUSTOMERS, EMPLOYEES, REPORTS, ADMIN, and a menu icon. Below the navigation bar is a section titled "My Calendar".

Under "My Calendar", there are fields for "Title:" (Default Calendar) and "Description:". Below these is a section for "Working Hours:".

The working hours are listed for each day of the week:

- Monday:** Title: Full Day, Start Time: 10:00:00, End Time: 18:00:00
- Tuesday:** Title: Full Day, Start Time: 10:00:00, End Time: 18:00:00
- Wednesday:** Title: Full Day, Start Time: 10:00:00, End Time: 18:00:00
- Thursday:** Title: Full Day, Start Time: 10:00:00, End Time: 18:00:00
- Friday:** Title: Full Day, Start Time: 10:00:00, End Time: 23:45:00
- Saturday:** Title: Full Day, Start Time: 00:00:00, End Time: 18:00:00

*Figure 166: My Calendar*

User can view the details of the calendar in the above Figure.

## My Accounts

Managing account settings

### Password

This is used to reset (or) change password of user.

**Navigation:** Admin>>My Account and Invoice>>Passwords

The screenshot shows a web application interface with a top navigation bar containing links: HOME, JOBS, WORKS, ROUTES, FORMS, LOCATE, DISPATCH, CUSTOMERS, EMPLOYEES, REPORTS, ADMIN, and a menu icon. Below the navigation bar is a section titled "Change Password".

Under "Change Password", there are three input fields for passwords, each with a placeholder text "\*\*\*\*\*". Below the input fields is a yellow button labeled "UPDATE PASSWORD".

*Figure 167: Change Password*

**Step 1:** Enter old password.

**Step 2:** Enter new password.

Step 3: Confirm new password.

Step 4: Click on Save.

## Invoice Recipients

User can configure who can receive invoice recipients by entering their E-Mail Address

**Navigation:** Admin>>My Account and Invoice>>Invoice Recipients.

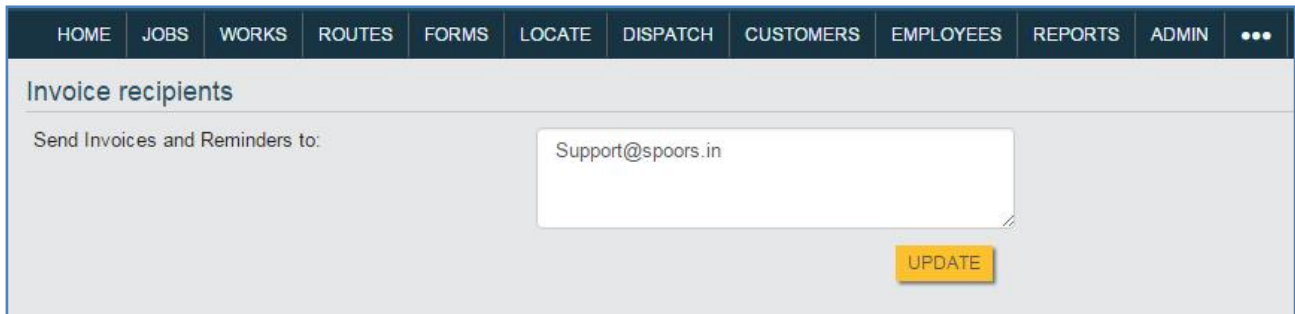


Figure 168: Invoice Recipients

Step 1: Enter the mail Id

Step 2: Click on Save

## Invoice

**Navigation:** Admin>>My Account and Invoice>>Invoice Recipients

It shows details about total amount to be paid, tax, due date, status, etc.

## Notifications

**Navigation:** Admin>>My Account and Invoice>>Notifications

This schedules the Notifications and alerts the users for selected activities. List of all notifications are displayed in this screen, user can delete selected notifications, user can filter notifications by applying filters from left pane, filter set includes event types, and status, Name, select filter set and click on apply to filter notifications, click on reset to clear all filters.

Click on **Schedule New Notification** to create new notification

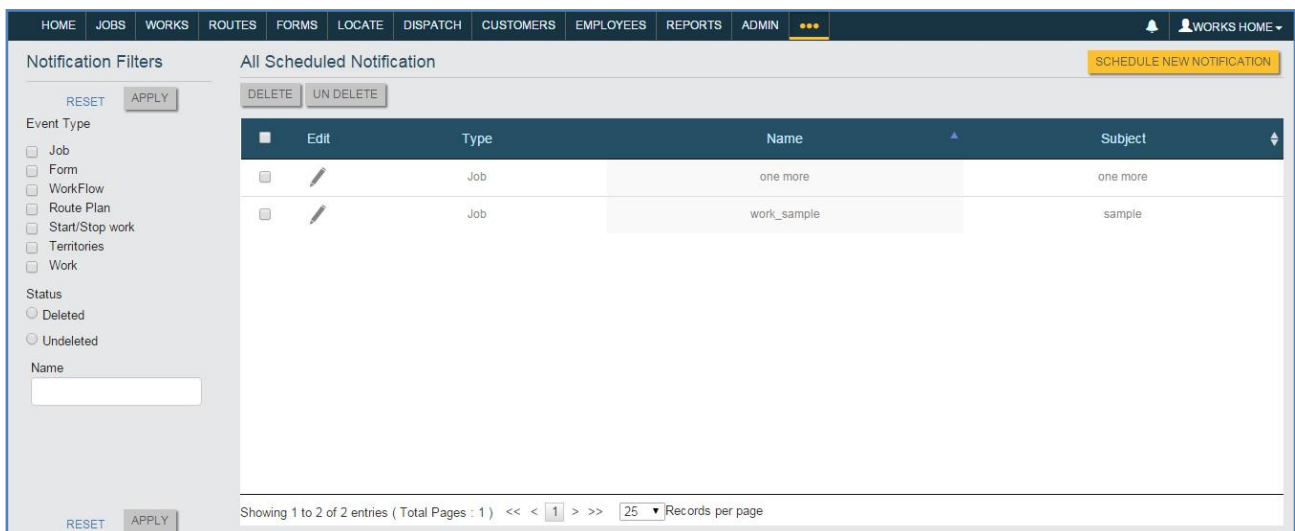


Figure 169: All Schedule Notification

**Figure 170: Create Notification**

**Step 1:** Select Notification Quality

**Step 2:** Select rule type

**Step 3:** Enter name

**Step 4:** Select when Notification has to fire

Rule type is divided 2 categories

Time based

Event Based

### Time Based

If Time based is selected notify when details can be observed here below

- 1) Unassigned job is about to Start.
- 2) Job Not completed within End time.
- 3) Employees not syncing
- 4) Employee not at customer location when job starts.
- 5) Work About to get delayed.
- 6) Employee not at customer location when work starts

These all are the notify items which user can use to notify him.

### Event Based

If Event based is selected Notify details can be observed here understand.

- 1) Job
- 2) Form
- 3) Work



- 4) Work flow
- 5) Route plan
- 6) Out of Territories
- 7) Employee Punch In / Punch Out

Notifications about these details will be sent to user when they are

- 1) Added
- 2) Modified
- 3) Deleted
- 4) Completed
- 5) Rejected

### Mode of Notifications

*Figure 171: Mode of notifications*

Notifications can be sent by Email, SMS and Web-Notifications. Select appropriate checkbox to receive Notifications.

For **SMS**, Phone Number has to be entered in the text box provided

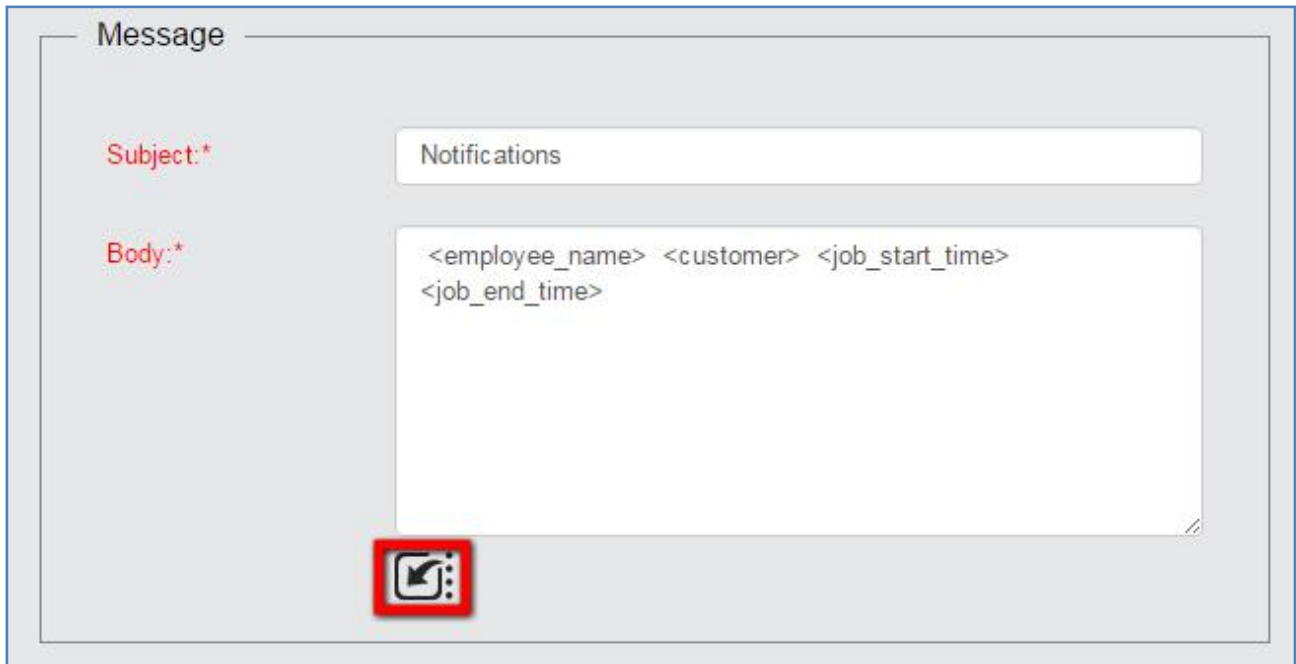
**Note:** Phone number must suffix with country code.

For **web-Notifications** simply select the check box.

For **E-Mail** Enter the Email Id in the provided Text field and set format of mail

### Format of E-mail

User can set the format of E-mail, he can select the details that should be in mail, and these details will be sent to mail.



The screenshot shows a 'Message' form with two main sections: 'Subject:\*' and 'Body:\*'. The 'Subject' field contains the text 'Notifications'. The 'Body' field contains the placeholder text: `<employee_name> <customer> <job_start_time>`  
`<job_end_time>`. Below the 'Body' field, there is a red square icon with a white arrow pointing to the right, indicating a save or confirm action.

*Figure 172: Format of E-mail*

*Step 1:* Enter subject

*Step 2:* Click on the selected mark and Select fields in the pop up

*Step 3:* Click on save.

## Leaves

Leaves applied by employees are displayed in this screen. User (manager/root employee) can approve or reject leave. User (manager) can apply leave by clicking on apply leave and can also check his applied leaves by clicking on my leaves, user can filter leaves by applying filters from left pane, filter set include approved, rejected, applied, cancelled. Select filter set and click on apply to filter leaves, click on reset to clear all filters.

**Navigation:** menu bar >>3 dots>>leaves

[HOME](#)
[JOBS](#)
[WORKS](#)
[ROUTES](#)
[FORMS](#)
[LOCATE](#)
[DISPATCH](#)
[CUSTOMERS](#)
[EMPLOYEES](#)
[REPORTS](#)
[ADMIN](#)

[WORKS HOME](#)

[Leave Filters](#)

[RESET](#)
[APPLY](#)

Employee

Status  
☐ Applied  
☐ Approved  
☐ Cancelled  
☐ Rejected

Leave Start Between  
  
and

[RESET](#)
[APPLY](#)

[Leaves](#)

[APPROVE](#)
[REJECT](#)

[APPLY LEAVE](#)
[VIEW MY LEAVES](#)

	Employee	From	To	Leave Type	Status
<input type="checkbox"/>	Lava Andriod	2015-03-11 12:00 AM	2015-03-11 11:59 PM	Leave	Approved
<input type="checkbox"/>	work22 work3	2015-04-24 12:00 AM	2015-04-24 11:59 PM	Leave	Rejected
<input type="checkbox"/>	test emp	2015-04-30 12:00 AM	2015-04-30 11:59 PM	Leave	Rejected
<input type="checkbox"/>	Lava Andriod	2015-06-26 12:00 AM	2015-06-28 11:59 PM	Leave	Rejected
<input type="checkbox"/>	Lava Andriod	2015-06-26 12:00 AM	2015-06-26 11:59 PM	Leave	Rejected
<input type="checkbox"/>	test emp	2015-07-06 12:00 AM	2015-07-06 11:50 PM	Leave	Approved

Showing 1 to 6 of 6 entries ( Total Pages : 1 )
[<<](#)
[<](#)
[1](#)
[>](#)
[>>](#)
25 Records per page

Figure 173: Leaves

User can approve or reject leave by clicking on corresponding approve or reject button.

## View My Leaves

[HOME](#)
[JOBS](#)
[WORKS](#)
[ROUTES](#)
[FORMS](#)
[LOCATE](#)
[DISPATCH](#)
[CUSTOMERS](#)
[EMPLOYEES](#)
[REPORTS](#)
[ADMIN](#)

[WORKS HOME](#)

[Leave Filters](#)

[RESET](#)
[APPLY](#)

Employee

Status  
☐ Applied  
☐ Approved  
☐ Cancelled  
☐ Rejected

Leave Start Between  
  
and

[RESET](#)
[APPLY](#)

[My Leaves](#)

[CANCEL](#)

[APPLY LEAVE](#)
[LEAVES APPROVALS](#)

	Edit	Id	Employee	From	To	Leave Type
<input type="checkbox"/>		4601	Works Home	2015-09-04 12:50 PM	2015-09-04 01:00 PM	Leave
<input type="checkbox"/>		4597	Works Home	2015-09-03 06:58 PM	2015-09-04 06:59 PM	Leave
<input type="checkbox"/>		4596	Works Home	2015-09-09 12:00 AM	2015-09-10 11:50 PM	Leave
<input type="checkbox"/>		4547	Works Home	2015-07-02 12:00 AM	2015-07-02 11:50 PM	Leave
<input type="checkbox"/>		933	Works Home	2014-11-02 12:00 AM	2014-11-02 11:50 PM	Leave

Showing 1 to 5 of 5 entries ( Total Pages : 1 )
[<<](#)
[<](#)
[1](#)
[>](#)
[>>](#)
10 Records per page

Figure 174: View My leaves

## Apply Leave

Click on Apply Leave

111

HOME	JOB	WORK	ROUTE	FORM	LOCATE	DISPATCH	CUSTOMER	EMPLOYEE	REPORT	ADMIN	...
------	-----	------	-------	------	--------	----------	----------	----------	--------	-------	-----

### Apply Leave

Timezone:

(GMT+05:30) Chennai, Kolkata, Mumbai, ...

\*From:

2015-10-01 13:22

\*To:

2015-10-07 13:22

\*Leave Type:

Leave

Actual Quota: 0

Available Quota: 0

Note:

SAVE

SAVE & NEW

*Figure 175: Apply Leave*

Step 1: Select time zone

Step 2: Select date and time zone

Step 3: Select leave type

Step 4: Click on save

Reporting manager has to approve leave, he can approve/reject leave, these leaves applications are displayed in leaves section in web panel.